User's Manual and Technical Reference

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POBITS

Peace Officer Background Investigation Tracking System

User's Manual and Technical Reference
by Kingsley Klosson

POBITS

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Our pledge to you...

Developing software for a specific business task such as POBITS requires insight into the business that the software developer must gain from the user community. You are encouraged to offer any suggestions for POBITS that may make it more useful or suitable to your purpose. Further, though we strive for perfection at all times, no software is perfect. If you happen to run into the only software bug that I put into this application on purpose, please let me know at support@essentialsoftwaredev.com. We will strive to make POBITS as good as we possibly can.

Table of Contents

Foreword 0

Part I Welcome 5

Part II Concept of Operation 7

1 POST Guidelines ... 7

2 What POBITS Isn't ... 8

Part III Candidate Information 10

1 Candidates List ... 10

Actions ... 12

Tagging Candidates for Actions ... 13

Mail Merge ... 13

Mail Merge Options ... 15

Mail Merge in MS Word ... 15

Changing Investigators for Multiple Candidates ... 15

Hiring ... 16

Making a Journal Entry ... 16

Summary Report ... 16

Checklist Report ... 16

Adding To Selection Board ... 16

Archiving ... 16

2 Candidate Record ... 17

Personal Identifying Information ... 17

Photos ... 23

Status Tab ... 24

Relatives and References Tab ... 25

Education Tab ... 27

Residence Tab ... 29

Employment Tab ... 31

Military History Tab ... 33

Financial Tab ... 34

Legal Tab ... 35

Motor Vehicle Tab ... 36

Examinations Tab ... 37

Interview Tab ... 38

Local Records Tab ... 40

Boards Tab ... 40

User Defined Tab ... 41

Journal Tab ... 42

Part IV Narratives and Comments 45

Part V Miscellaneous Functions 47

1 Creating Correspondence ... 47

2 Red Flag Check Boxes ... 48

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Part VI Reports 50

1 General 50
2 Predestination Dialog 50
3 Previewing 50
4 Print Destination Dialog 51
5 Archiving Reports 52
6 Candidate Summary Report 52
7 Checklist Report 54
8 Ineligibility Report by Reason 55
9 Ineligibility Report by Ethnicity 56
10 Selection Board Roster 57
11 Opportunity of Selection 58
12 Opportunity of Selection For a Job Classification 59

Part VII Selection Boards 62

1 Selection Boards - General 62

Part VIII Pick Lists 65

1 Candidates 65
2 Selection Boards 65
3 Job Classifications 65
4 Groups 65
5 Ineligibility Reasons 66
6 Ethnicity 67
7 States 67

Part IX Application Security 70

1 General 70
2 Changing Your Password 70
3 Logging on as a Different User 70
4 Show Logged on Users 70
5 Screen Lock 71

Part X User Access Rights 73

1 General 73
2 User List 73
3 Strategies For User Access Right 74
4 User Groups 75
5 Establishing User Access for the First Time 75
6 Setting Access Rights 75

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Part XI License and Registration 78
1 License ... 78
2 Registration ... 78
Part XII Technical Reference 80
1 Pre-Purchase Technical Information ... 80
2 About the Data File System ... 81
3 Network Installation ... 81
4 Multi-user considerations ... 81
5 Data File Management ... 81
Part XIII Purchasing and Support 84
1 Purchasing and Renewing ... 84
2 Support ... 84
Index 86

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Welcome

Part I

Welcome

1 Welcome

Welcome to POBITS
Peace Officer Background Investigation Tracking System

Documentation as of October 2007

Peace Officer Background Investigation Tracking System (POBITS) is designed to assist public and private sector agencies and industries to track the progress of background investigations being performed on candidates for employment positions which require higher standards of personal character and integrity. POBITS is particularly well suited for agencies that hire sworn peace officers, but can be useful to any organization or agency where numerous candidates are simultaneously processed through background investigations or hiring processes that involve the accumulation of background investigative data. POBITS has been designed to support the California Commission on Peace Officer Standards and Training (POST) guidelines as closely as possible, though its design does not limit it to use by California agencies. The California POST guidelines and other useful information can be found at the CA POST website at http://www.post.ca.gov.

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Concept of Operation

Part II

Concept of Operation

2 Concept of Operation

POBITS is designed to support the process of managing multiple background investigations as part of a pre-hire process for peace officers and other workers though you may find it useful for any background investigative process where multiple background checks are being performed simultaneously.

#InvestigativeAreaPOBITS focuses on several areas of investigation which include:

- Personal and Identifying Information 17
- Financial History 34
- Tests and Examinations 37
- Education History 27
- Prior Residence History 29
- Prior Employment History 29
- Legal History 35
- Local and other Record Checks 40
- Motor Vehicle Operation History 36
- Military History 33
- Interviews 38

Each investigative area provides different items for review and a single "Review Compete" check box to signify that this investigative area is complete. In most cases, the items within the review area as well as the details will be assimilated into the final investigative package which POBITS will generate.

A few areas, such as prior residences, prior employment, and relatives and references, enable the generation of mail merge letters using templates provided with POBITS or created by you. These letter can be generated and tracked for a response and each response can be qualified by the investigator.

POBITS has a feature for assigning candidates to selections boards. Once the selection board's results are noted in POBITS, you can ascertain interesting statistics about your overall selection processes.

Lastly, POBITS provides useful data regarding your candidates such as rate of ineligibility for various reasons and by ethnicity and gender. Other reports provide metrics such as opportunity of selection for your candidates. These reports fall into the category of management and oversight information that is often needed for resource management.

2.1 POST Guidelines

POBITS is modeled to support the California Peace Officer Standards and Training (POST) guidelines. While other states use various forms of POST, the California guidelines were chosen as the model because of the maturity of the products and the size of the supported market. Note that there is nothing in POBITS that is state specific and POBITS should be usable and useful for any organization performing background investigations for Peace Officers or other positions requiring high moral character.

For more information, visit the California POST website at http://www.post.ca.gov

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2.2 What POBITS Isn't

POBITS does not perform background investigations or assist in that effort other than by providing electronic record keeping and other automated functions. POBITS contains no logic to determine whether or not a candidate is suitable for appointment to any position nor does it contain any logic to determine whether or not your investigation is complete. Essentially, POBITS does not do your work for you but it does provide a systematic process for tracking the work you have done and providing at-a-glance information on the status of your investigations. If you are reviewing POBITS on the premise that it is some kind of automated background checking system - it isn't.

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Candidate Information

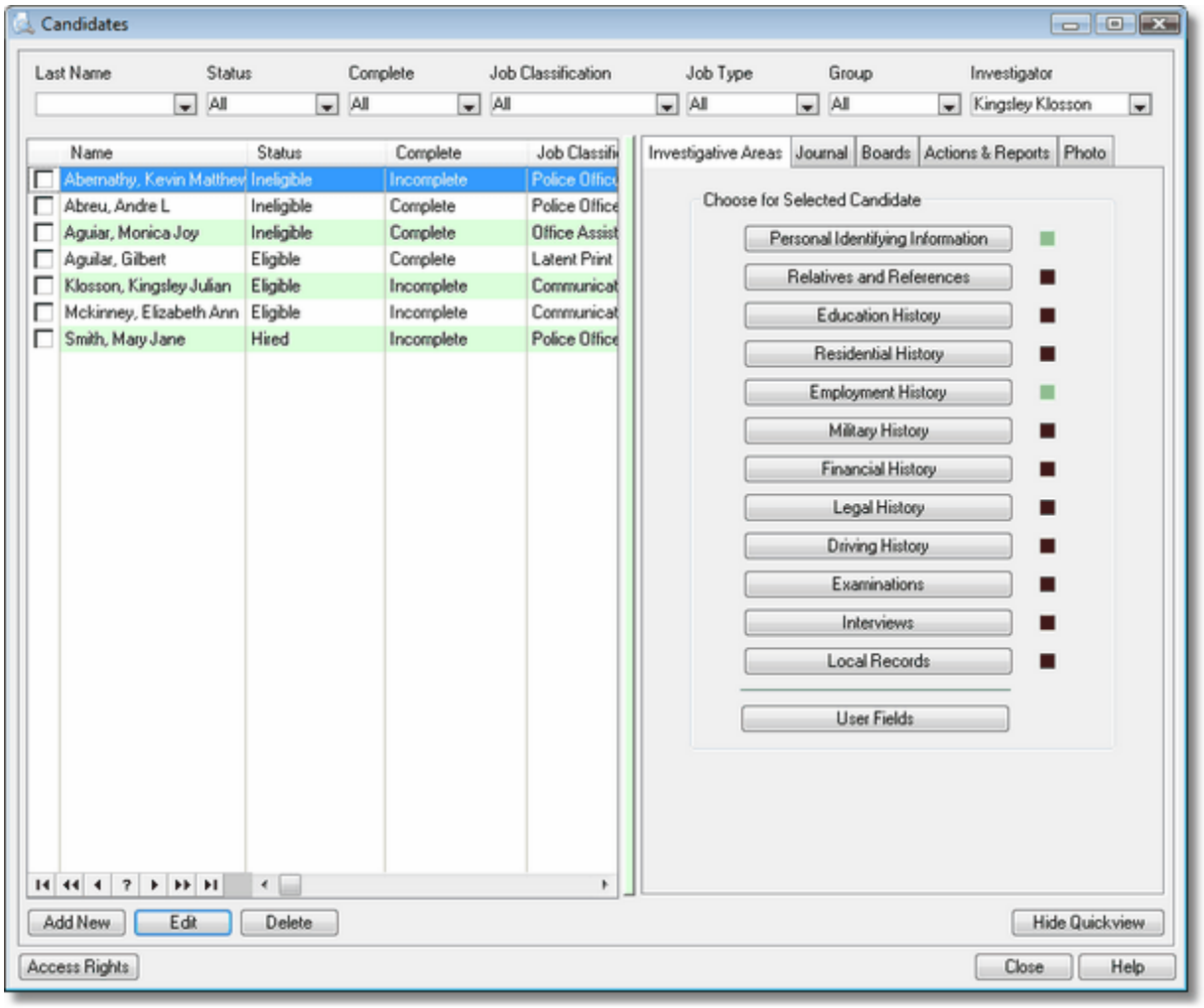
Part II

Candidate Information

3 Candidate Information

3.1 Candidates List

The below graphic describes many of the features of the Candidate list view.



Candidate List View

The candidate list view is a focal point of POBITS. This is where you will seek out candidate records for assessing progress or to find a record for updating. The list itself can be sorted and filtered to obtain a very discreet list conforming to your needs. On the right, the Quickview tab displays associated record details for each candidate as you scroll through the list. In many cases this will be easier than opening the record just to view a simple fact. For a more comprehensive view, open the record by double-clicking on it or selecting the record and pressing the Edit button.

Sorting
Sort the list by clicking on the column header of your choice. Click again to reverse the sort order. The header will display [+] or [-] as appropriate.

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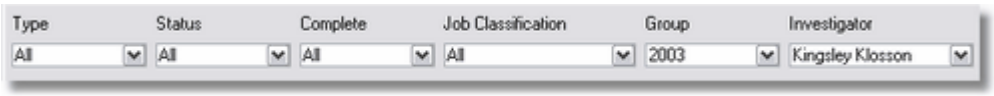
Filtering
Filter the list by selecting a criteria for each filter. Each filter is cumulative. Each filter also has an entry for "All" which essentially negates that particular filter.



Filters on the Candidate List Screen

Quickview Tab
As explained above, the Quickview tab can display associated detail from the record selected in the list. Note that there is a split bar control with which you can move the Quickview left or right. The intent is to enable you to move the Quickview tab next to candidate names in the list for easier viewing.

Actions
The Action tab, located on the Quickview tab provides access to actions that can be performed on a candidate or a selected group of candidates. The intent is that you can use the filters to obtain a discreet list of candidates and then tag some or all of the candidates in that list. Once they are tagged, you can select one of the actions on the action tab which includes mail merge 13, reports, and record archiving 16 discussed in other sections of the manual.

Photos
By selecting the Photo tab, you can view the first photo for each candidate as you scroll through the candidate list.

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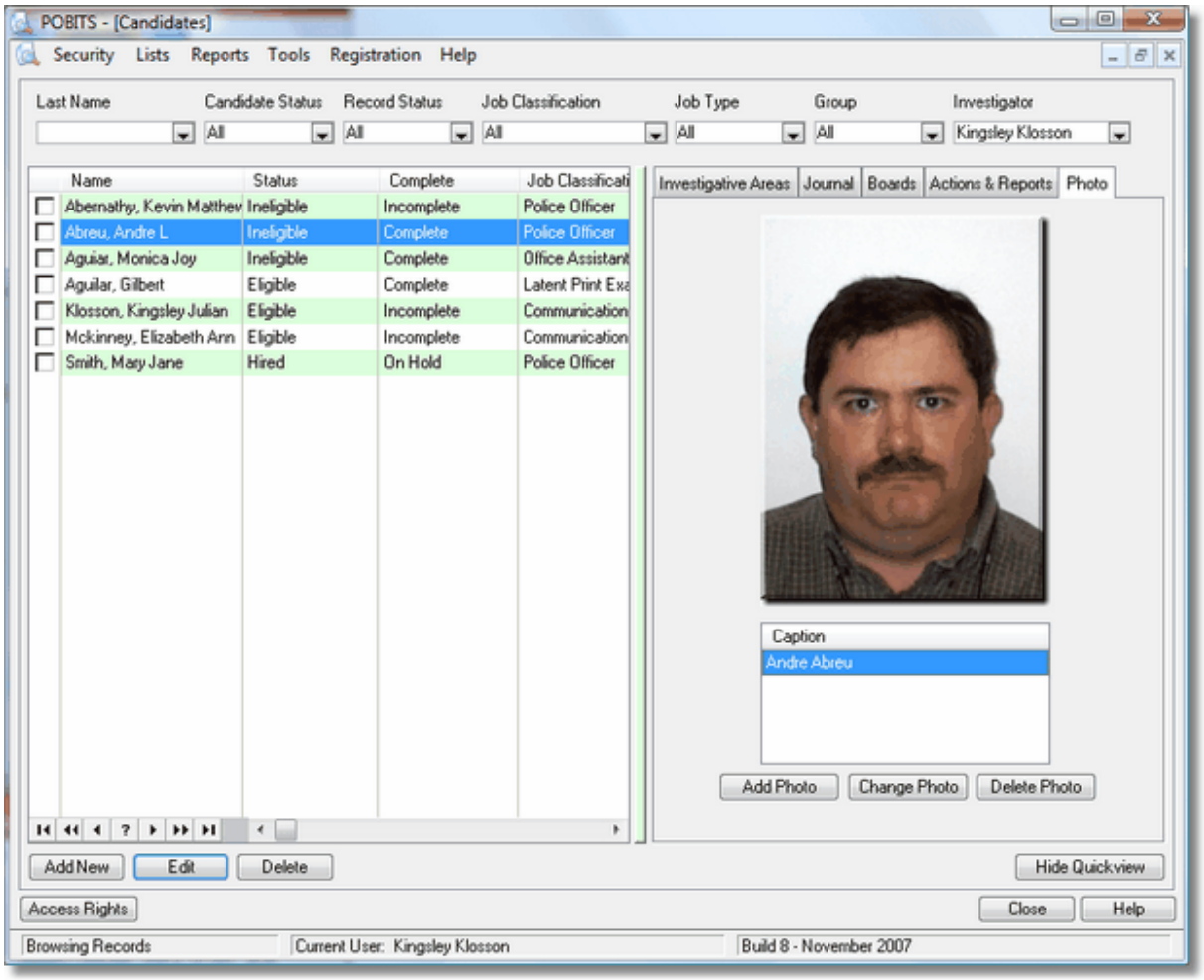
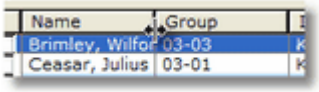


Candidate Photos

Auto Column Width

You can adjust any column's width to automatically size itself to the widest element in the column by double clicking between the columns when the cursor is in re-size mode.



Auto-size Columns

3.1.1 Actions

The Actions tab of the Candidate list provides a means to perform certain function on each tagged candidate.

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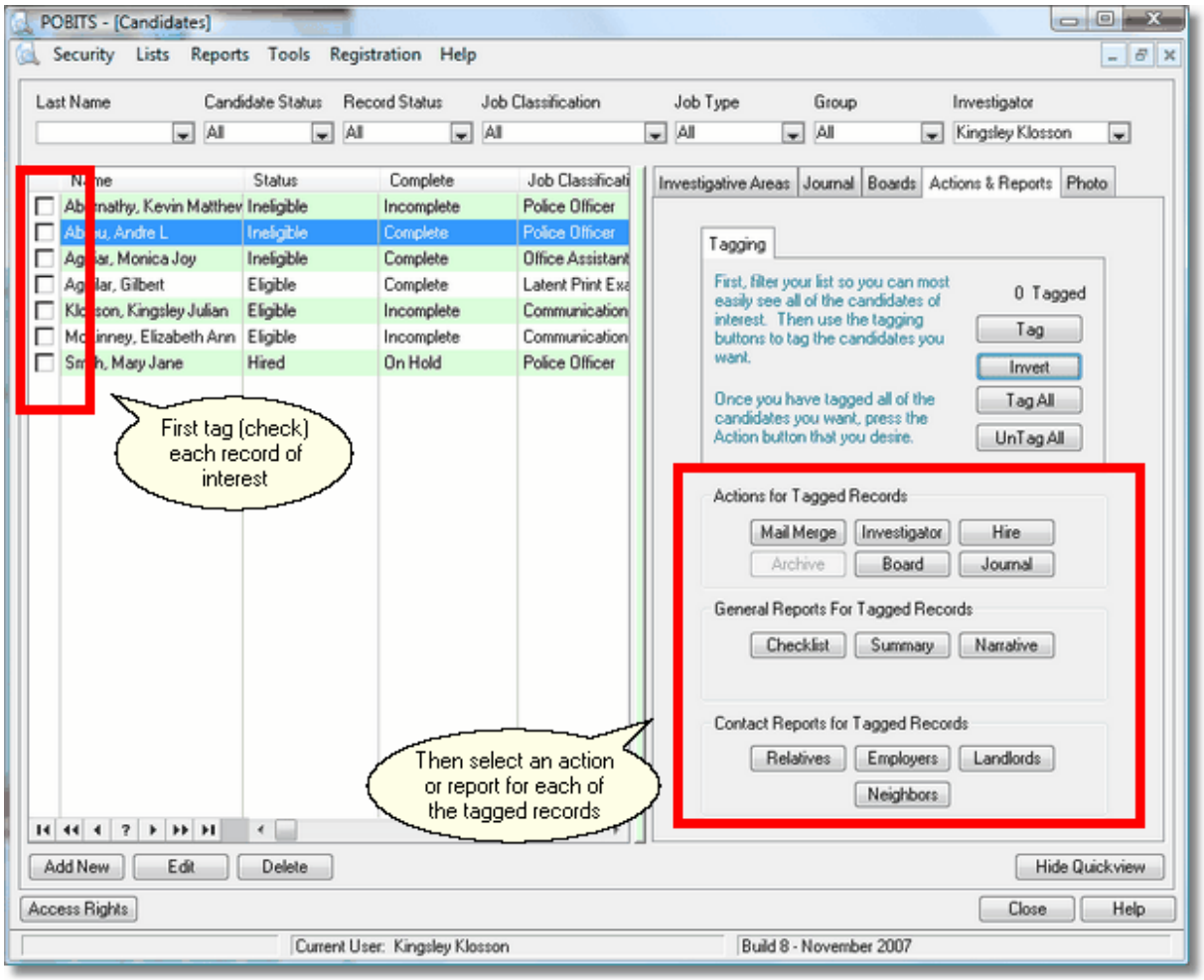
Action tab

3.1.1.1 Tagging Candidates for Actions

The actions tab has functions that are applied only to *tagged* candidates on the candidate list. To tag a candidate, click on the tag box on the list or use the Tag button on the action tab.



Tagging Records

3.1.1.2 Mail Merge

POBITS supports using Microsoft Word's mail merge feature for creating correspondence either *to* or *about* your candidates. Mail merge is a simple process.

1. Start with a record or a set of records.

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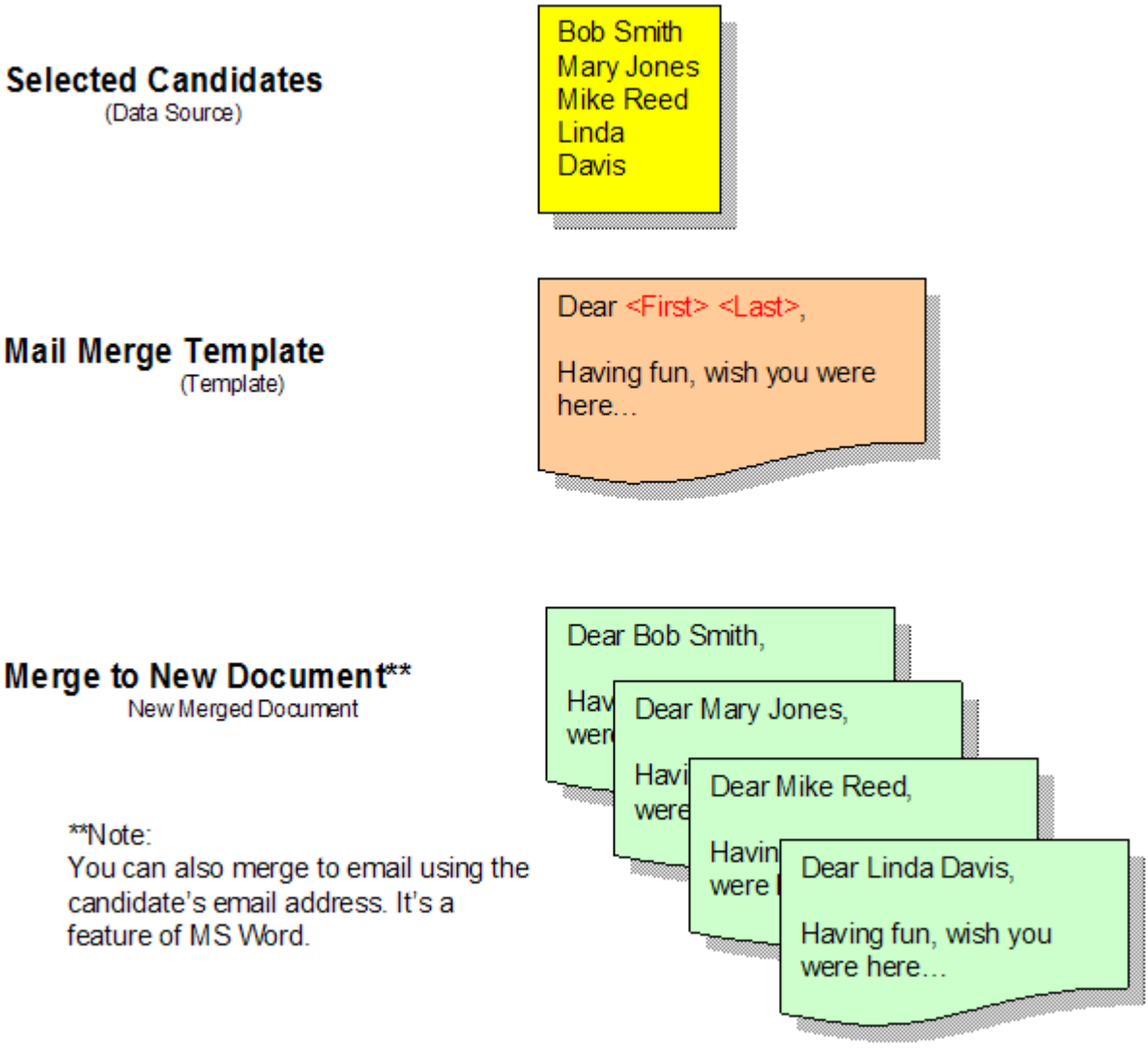
2. Open a template document (new or ready made).
3. Change text or add field tokens as necessary.
4. Merge to Printer, New Document, or Email as desired.

The main thing to understand is that you will have any number of pre-formatted documents for a variety of purposes. These are templates. From the template, you create a document for each candidate record. POBITS comes with several such templates that can be easily modified for your use. Creating your own template is easy and if you already have some documents that you like to re-use, you can set those up as mail merge documents for POBITS.

This graphic illustrates the basic concept of mail merge operations. You can also read all about Word's mail merge features in the Word Help system.



Mail Merge Concept

POBITS generates a new data source file each time you perform a mail merge function. The data source file name is always the name of the currently logged on user with a .txt extension. So when John Smith is logged on, the data source file is Smith.txt. This

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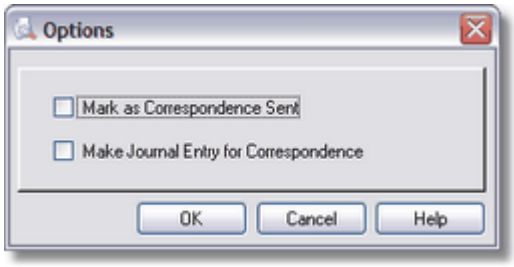
enables more than one system user to perform mail merge activities concurrently without locking files. Note however, that once you have performed a mail merge operation, you will need to close your MS Word mail merge template document before you can perform another mail merge operation because the data source file will be locked open.

3.1.1.3 Mail Merge Options

When performing a mail merge function you are presented with an Options screen. There are two options available and you may select either or both. The first option is mark the correspondence as Sent. This will enter the date and the name of the logged on user in the correspondence sent field of the item. The second option is to log the even in the candidate's journal. This will create an automated journal entry indicating the date, the logged on user, and a description of the event, which is generally that a certain letter was mailed on this date.

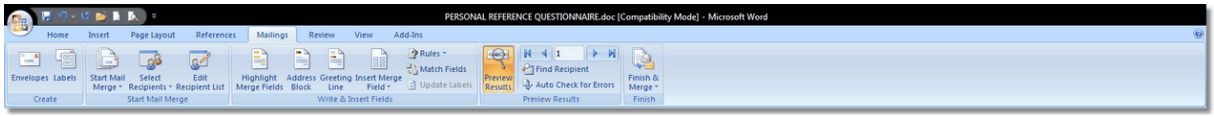


Mail Merge Options

3.1.1.4 Mail Merge in MS Word

Whenever you have a word document open with a connection to a data source, Word's Mail Merge Tool Bar will be visible. Placing your mouse pointer over each item will describe its use in the tool tip. Note the button labeled ABC and highlighted below changes from viewing field tokens such as <<Last_Name>> to viewing actual data such as Jones. Word's mail merge tool bar is shown below though there may be differences in appearance in different versions of MS Word.

MS Word Mail Merge Tool Bar (Word 2003 and earlier)



MS Word Mail Merge Tool Bar (Word 2007)

3.1.1.5 Changing Investigators for Multiple Candidates

You can change the investigator for a group of candidates easily. Open the candidate list, select and tag your candidates, then press the Investigator button and select the investigator to be applied to all tagged candidates. This can be particularly useful when an investigator leaves your unit and is replaced by someone else. In this case, you can reassign the investigator for a group of records very easily.

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Select New Investigator
All of the tagged candidates will have their investigator reassigned to the investigator you select below. Press Cancel to abort this operation.
Kingsley Klosson
Mary Stevens
OK
Cancel
Help

Action - New Investigator

3.1.1.6 Hiring

Use the Hire button to set the Status of each tagged candidate to "Hired". When you do so, you must also select the Selection Board which selected the candidate for hiring.

3.1.1.7 Making a Journal Entry

Use the Journal button to add a Journal Entry to each tagged candidate. This must be the same entry for each candidate record.

3.1.1.8 Summary Report

This action will print a Candidate Summary Report 52 including each tagged candidate. For details, see the Reports Chapter.

3.1.1.9 Checklist Report

This action will create a Candidate Checklist Report 54 including each tagged candidate. For details, see the Reports Chapter.

3.1.1.10 Adding To Selection Board

You can add all tagged candidates to a selection board 62 by tagging them and pressing the action button labeled Board. After selecting a Board from your Board list, the tagged candidates will all be added. Note that if you tag a candidate for a position other than the position for which the board is created, POBITS will advise you during the process. You will then be able to either skip that candidate or add them anyway.

3.1.1.11 Archiving

***** The Archiving feature is disabled in Build 004 pending other database modifications*****

Archiving removes the record from the main POBITS database and places it in a separate storage area. You may never need or want to archive any records - it's entirely optional. However, there may come a time when system performance is impacted by the number of records. There is no theoretical limit on the number of records - millions are certainly possible. However, because POBITS is a data file system and because it must perform its filtering duties at the work station (as opposed to at the server), performance issues may become noticeable at around 10,000 records or so (highly dependent on computer and network hardware). In this case, it may be useful to archive some records. Note that the archive does not need to filter records and viewing is performed on a page basis (meaning that the entire dataset does not need to be sent to the workstation). So there should never be any reason to delete records from the archive, although it is possible to do so.

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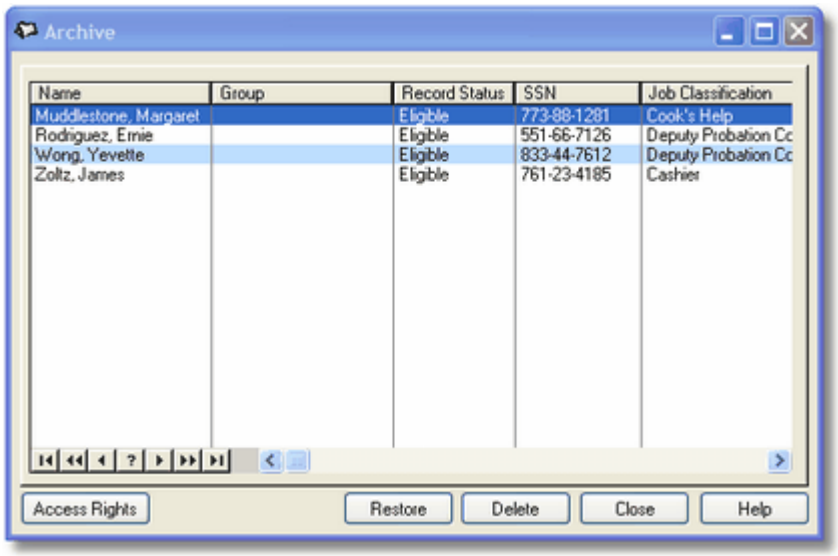
The business of screening and hiring personnel, especially in the public sector, receives considerable scrutiny so good record keeping and storing is essential - that's why POBITS was made.

To recover a file from the archive:

1. Open the Archive list (from the Lists Menu).
2. Select the record to restore by clicking on it.
3. Press the Restore button.

The record will now be accessible in the normal Candidate list. Note however, that when you archive a candidate they are permanently removed from any selection boards 65 they were on and are not reinstated when you restore the record.



Archive Window

3.2 Candidate Record

The candidate records is the fundamental data area in POBITS where you will spend the preponderance of your work-time. Because each candidate's record contains so much information, the Candidate Information screen is divided into several logical tabs each encompassing either a major investigative area or other information logically grouped for efficient access. For those tabs that represent a major investigative area, a sub-tab exists for the investigator to provide narrative information relevant to that area. The narrative information is used by POBITS when generating narrative reports. Also on the sub-tab is a check box for the investigator to indicate that their review of the investigative area is complete. This status is indicated on the Quickview tab of the Candidate List.

3.2.1 Personal Identifying Information

The personal tab of the Candidate record provides input for all of the candidate's personal and identifying information. Additionally, there are sub-tabs for photos, date/place of birth, and the investigator's narrative for the person facts. Note that fields which are normally formatted in some manner, such as SSN#, telephone numbers, and dates, are automatically formatted by POBITS and generally, you only need to enter digits. Fields for names and places will auto capitalize the first letter of each word. Date fields can be

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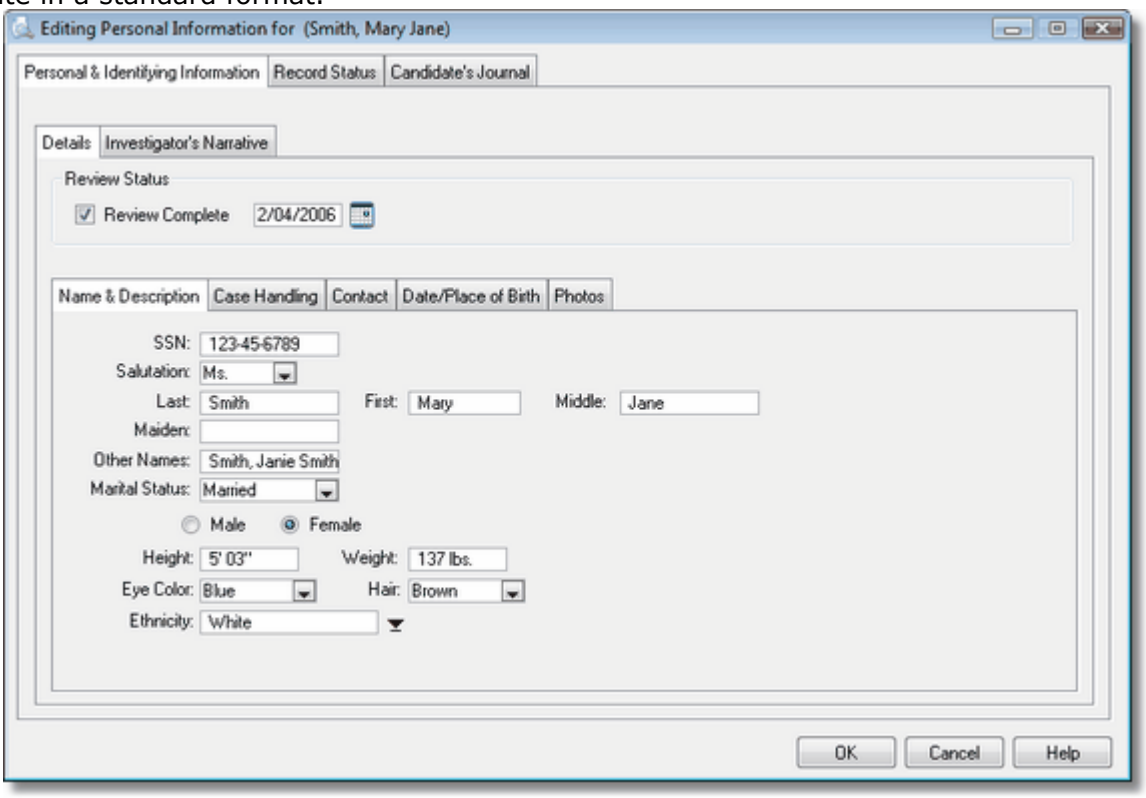
entered in just about any format and POBITS will reconcile your input and display the date in a standard format.



Personal Tab - Name & Description Sub-Tab

The Case Handling sub-tab provides for the details of the record, the assigned investigator, the position the candidate is applying for, etc.

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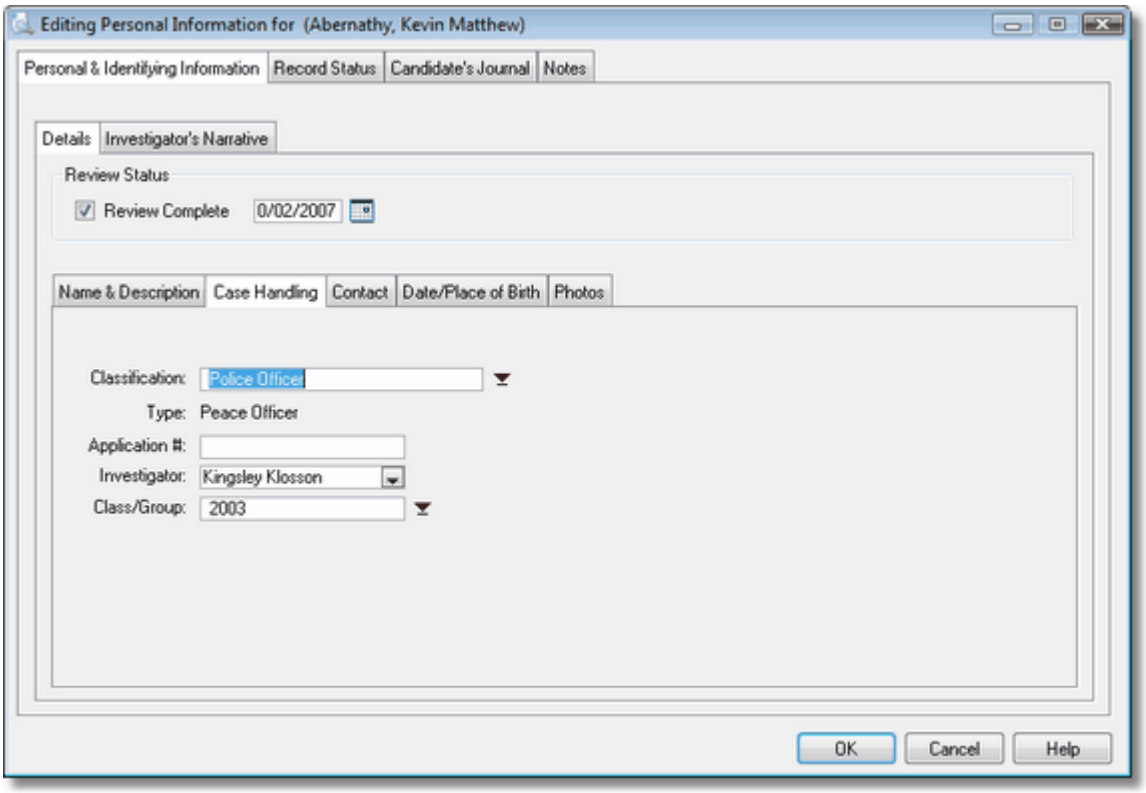

Personal Tab - Case Handling Sub-Tab

The Address sub-tab contains the details of the candidate's current physical address, email address, and phone numbers.

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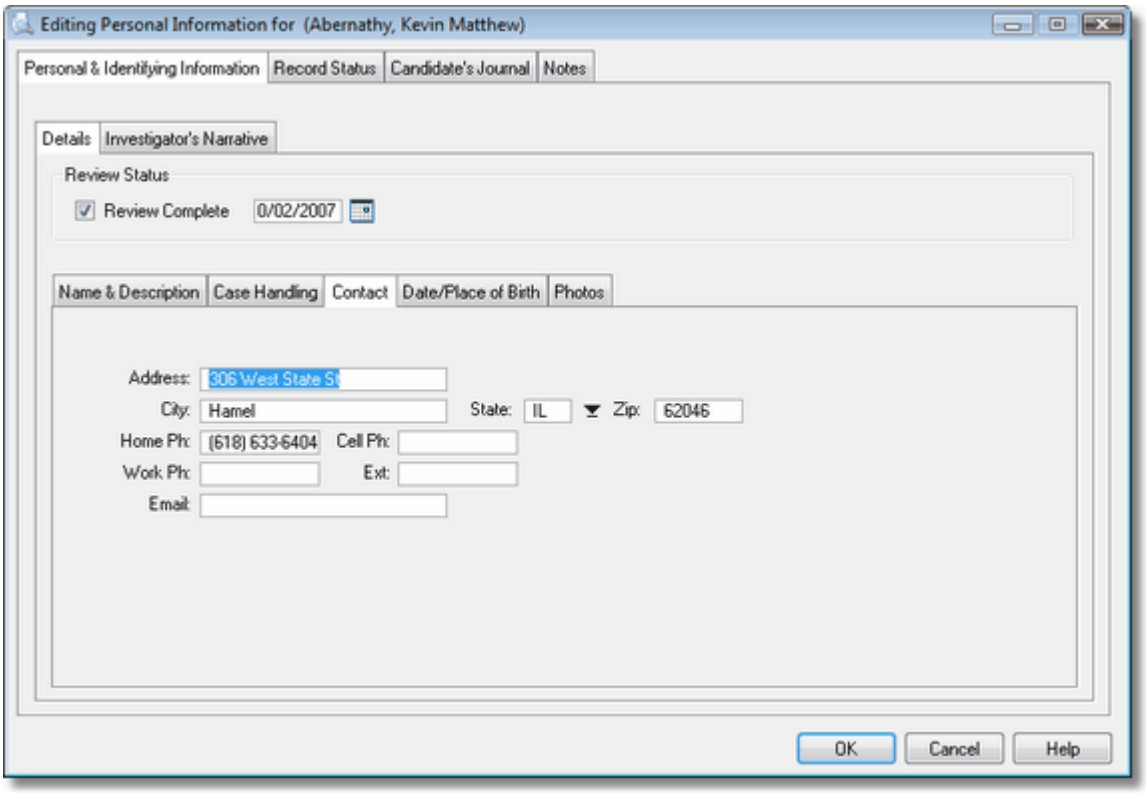

Personal Tab - Address Sub-Tab

The Date/Place of Birth sub-tab contains the details for the candidate's date and place of birth.

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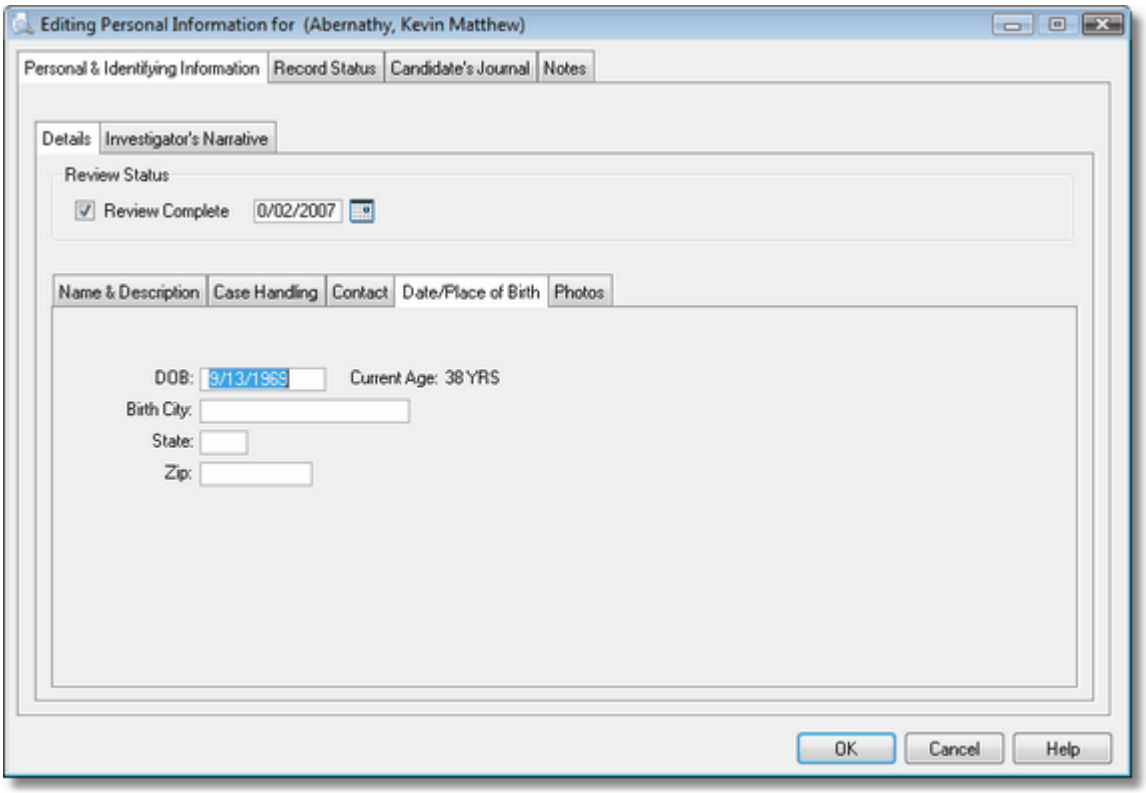

Personal Tab - Date/Place of Birth Sub-Tab

The Photos sub-tab provides a place to capture photos or other images. The images can be of a wide variety of file types. Internally, the images are stored in JPEG format. You can provide a caption for each photo such as "R. Jones Right Profile" or any other caption you choose. Note that each photo is stored in a POBITS data file so once the image is captured into POBITS the original image is no longer needed for POBITS to be able to display it.

Tip: The display fields for Pictures in POBITS are generally square. If your photos have a generally square aspect ration, then they will not appear distorted in the screen displays. You can use any photo editor with a cropping feature to achieve this.

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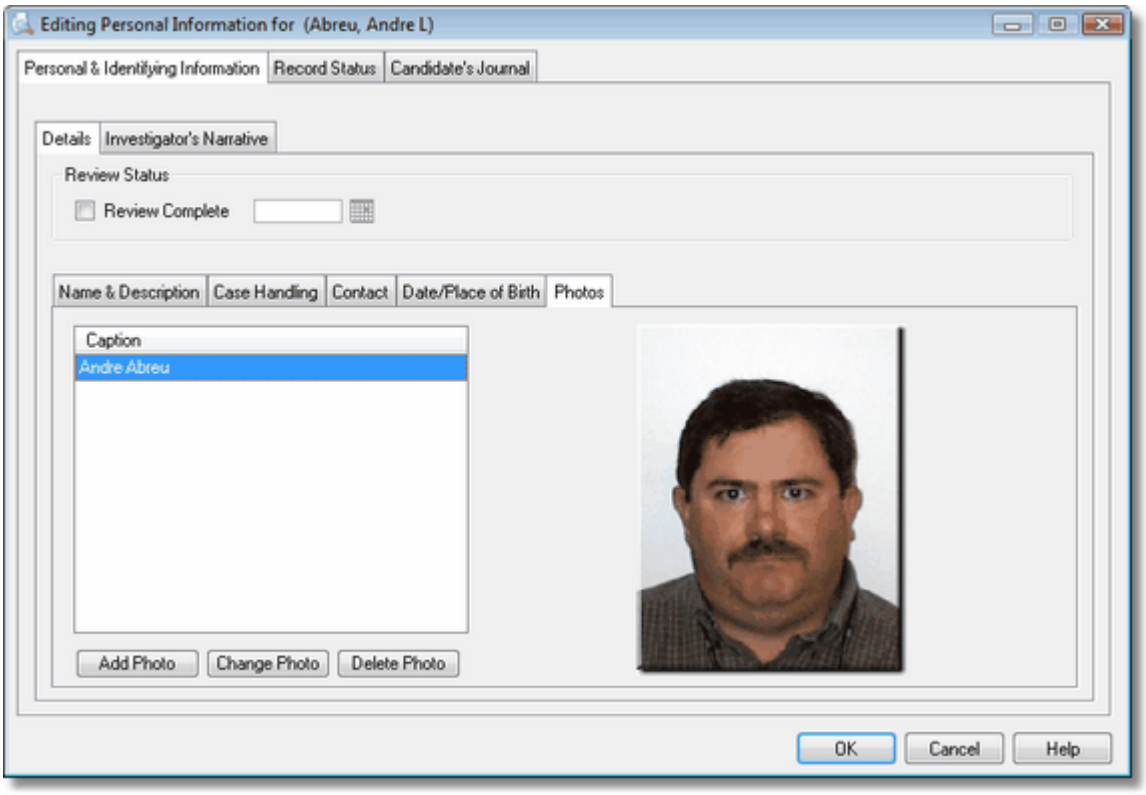
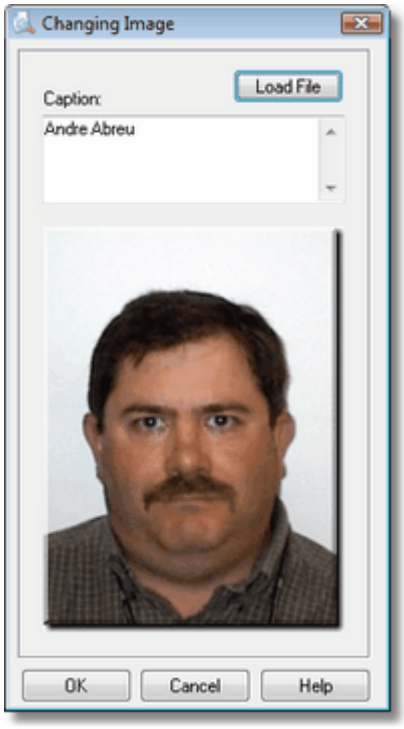


Personal Tab - Photos Sub-Tab



Load Photo Dialog

The Narrative tab provides a text area for the investigator to summarize their findings relevant to all personal information provided. As with all narrative sections, checking the

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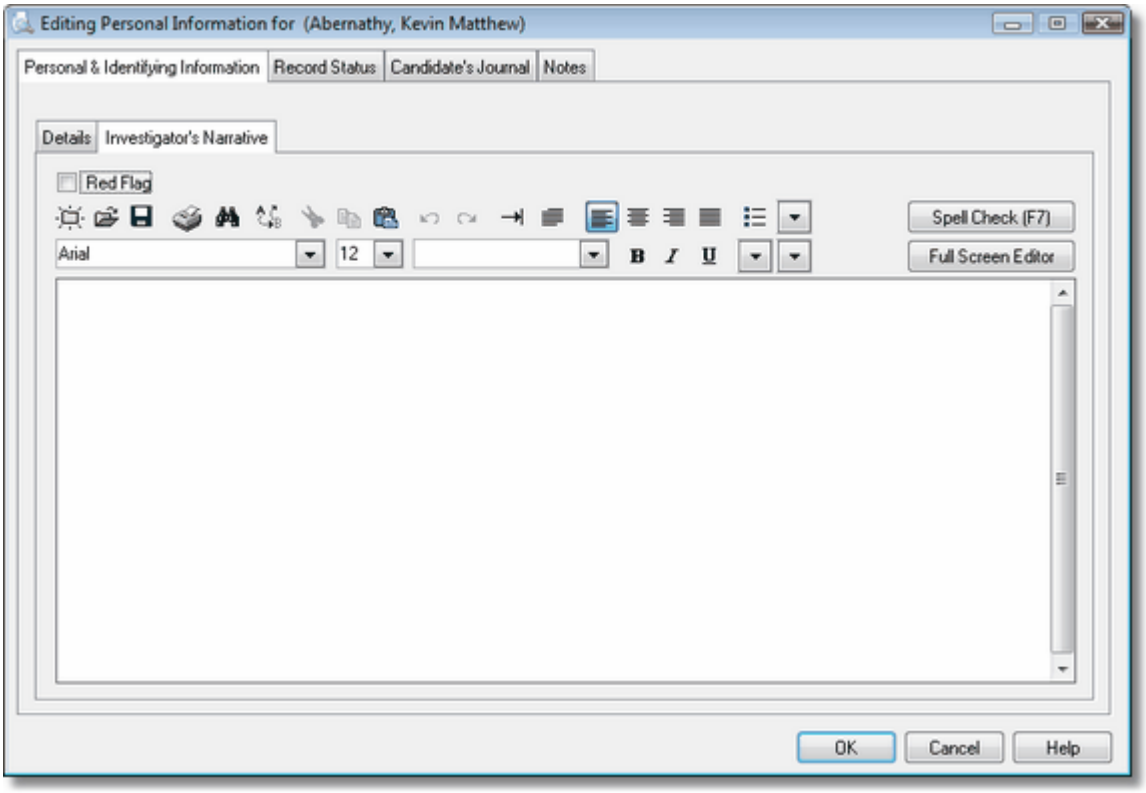
Red Flag box provides an indicator that a discrepancy or potentially disqualifying information was discovered.



Personal Narrative

3.2.2 Photos

You can add any number of photos to the Candidate's record. Photos can be accessed from the candidate list using the Phot tab of the Quickview Panel, or by accessing the Candidate's personal identifying information and select the Phot tab from there. When you elect to add or change a Photo you will see the screen below:

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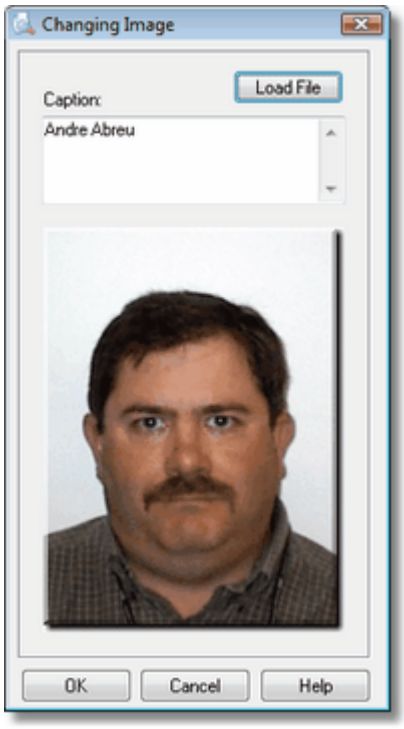

Add/change photo screen

Select a photo by pressing the Load File button. Use the file dialog to select the photo file. The file can be in just about any common graphics file format. Note that POBITS stores the photo image internally in its file system. Once the file has been added to the record, it is no longer needed by POBITS. Internally, POBITS will reduce the size of the image to approximately 133 x 166 pixels. It will crop as necessary to achieve this aspect ratio. Generally speaking, if you simply take a decent full-face portrait of the candidate using any digital camera, the image should scale and appear normally within POBITS.

3.2.3 Status Tab

POBITS assumes a simple work flow for processing a candidate. When the candidate's record is created, they are deemed ELIGIBLE and remain eligible until either deemed INELIGIBLE or HIRED. This is captured in the Eligibility Status section on the Status tab of the record. If deemed ineligible, a reason 66 is required. If hired, the date of hire or hire decision is required and the selection board 62 that selected the candidate are entered. Once the background check is complete, check the COMPLETE check box on the Status tab. It is assumed the candidate must be ELIGIBLE and COMPLETE to be considered for hiring. POBITS contains no logic that determines when the background check is complete. You may mark the record complete at your discretion.

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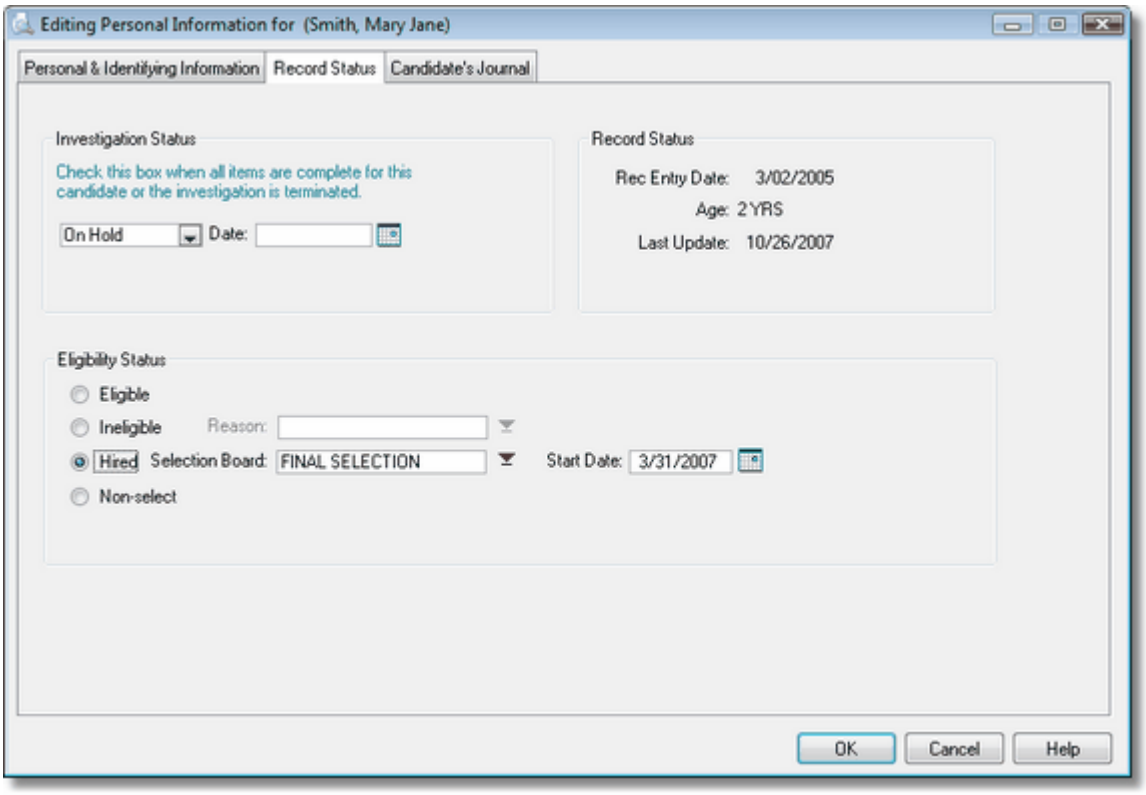

Candidate Status Tab

Optionally, you can create selection boards that reflect the actual selection boards in your organization. You can assign candidates to these board and those that are selected can have their status changed to Hired. Once you complete this process for any number of candidates, you can gather useful metrics on hiring by ethnicity and gender.

3.2.4 Relatives and References Tab

The relatives and reference tab contains a list of all relatives and references provided by the candidate. Individual records can be added, edited, or deleted in the normal manner.

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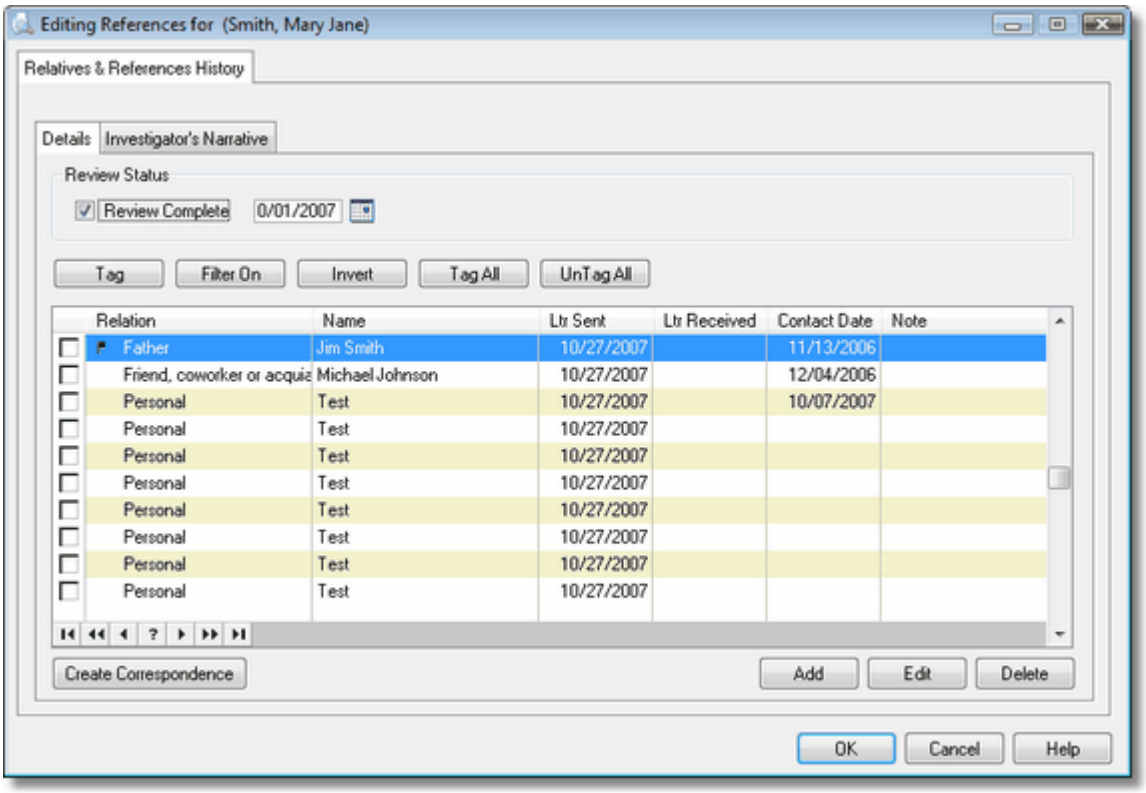

Relatives and Records Tab

Once the information is added, correspondence can be generated and tracked for each reference provided. Additionally, for each reference provided, the investigator can make notes regarding any information received. The notes will appear in CONTACT WITH RELATIVES AND REFERENCES section of the final investigative report.

The details of each individual record are viewed on the record's screen as shown below.

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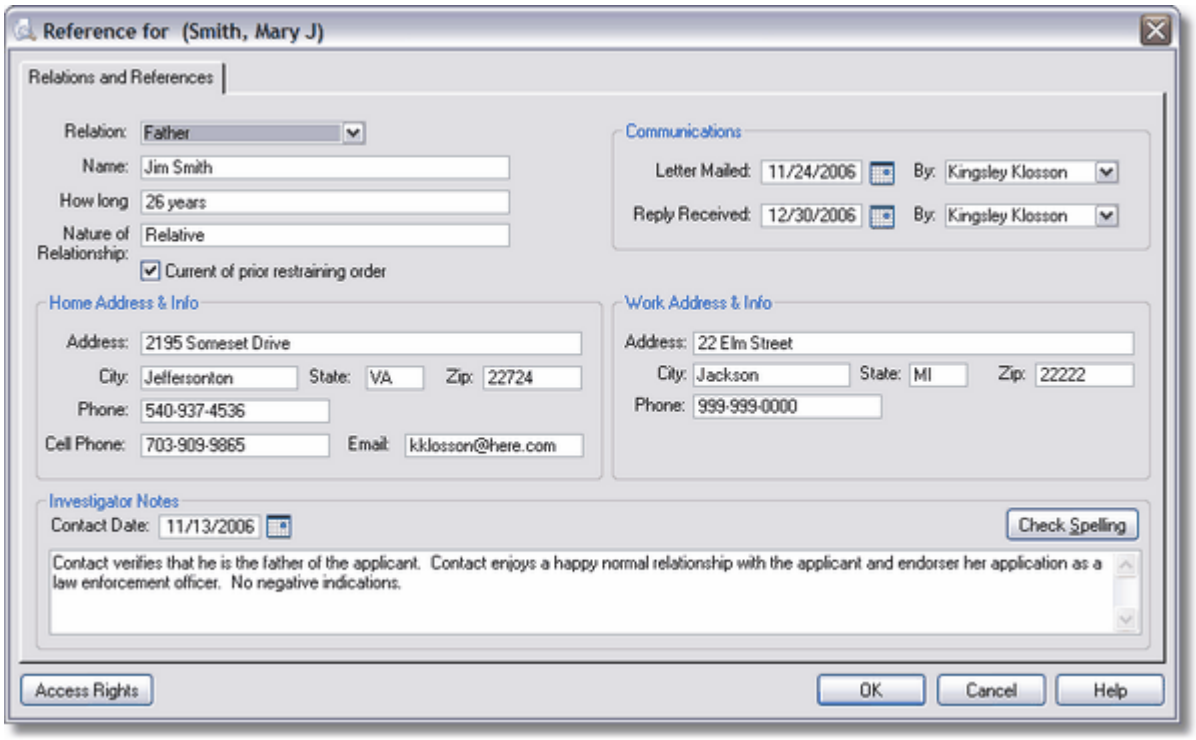
Reference for (Smith, Mary J)
Relations and References
Relation: Father
Name: Jim Smith
How long: 26 years
Nature of Relationship: Relative
Current of prior restraining order
Communications
Letter Mailed: 11/24/2006 By: Kingsley Klosson
Reply Received: 12/30/2006 By: Kingsley Klosson
Home Address & Info
Address: 2195 Someset Drive
City: Jeffersonton State: VA Zip: 22724
Phone: 540-937-4536
Cell Phone: 703-909-9865 Email: kklosson@here.com
Work Address & Info
Address: 22 Elm Street
City: Jackson State: MI Zip: 22222
Phone: 999-999-0000
Investigator Notes
Contact Date: 11/13/2006
Check Spelling
Contact verifies that he is the father of the applicant. Contact enjoys a happy normal relationship with the applicant and endorser her application as a law enforcement officer. No negative indications.
Access Rights
OK
Cancel
Help

Reference Detail Window

When creating correspondence, you have the option to automatically mark the record as "Correspondence Sent" and/or make a journal entry that the correspondence was created. Selecting both items is recommended. If you select to "Mark Correspondence as Sent", then the "Letter Mailed" and "By" fields will be automatically updated. If you select to make a Journal entry, the a journal entry will be generated and can be viewed in the Journal log for the selected Candidate.

When you have completed your review of the provided relatives and references, select the Narrative tab and make any relevant notes regarding your findings in this subject area. If there are discrepancies or potentially disqualifying information, check the Red Flag check box.

3.2.5 Education Tab

The education tab provides a list view for each education record offered by the candidate. As with all other primary investigative areas, it also offers a narrative tab and Red Flag checkbox that feeds certain reports and other output. Unlike the Residence, Employment, and Relatives & References tabs, the education items do not provide for the generation of communication and contact with each reference provided. This is because the Education section of the Personal History Statement does not capture sufficient addressing information to enable this functionality. However, it is possible to track your correspondence or contact with each educational institution. The screen also provides a checkbox to indicate whether or not a Basic Course has been completed by the candidate.

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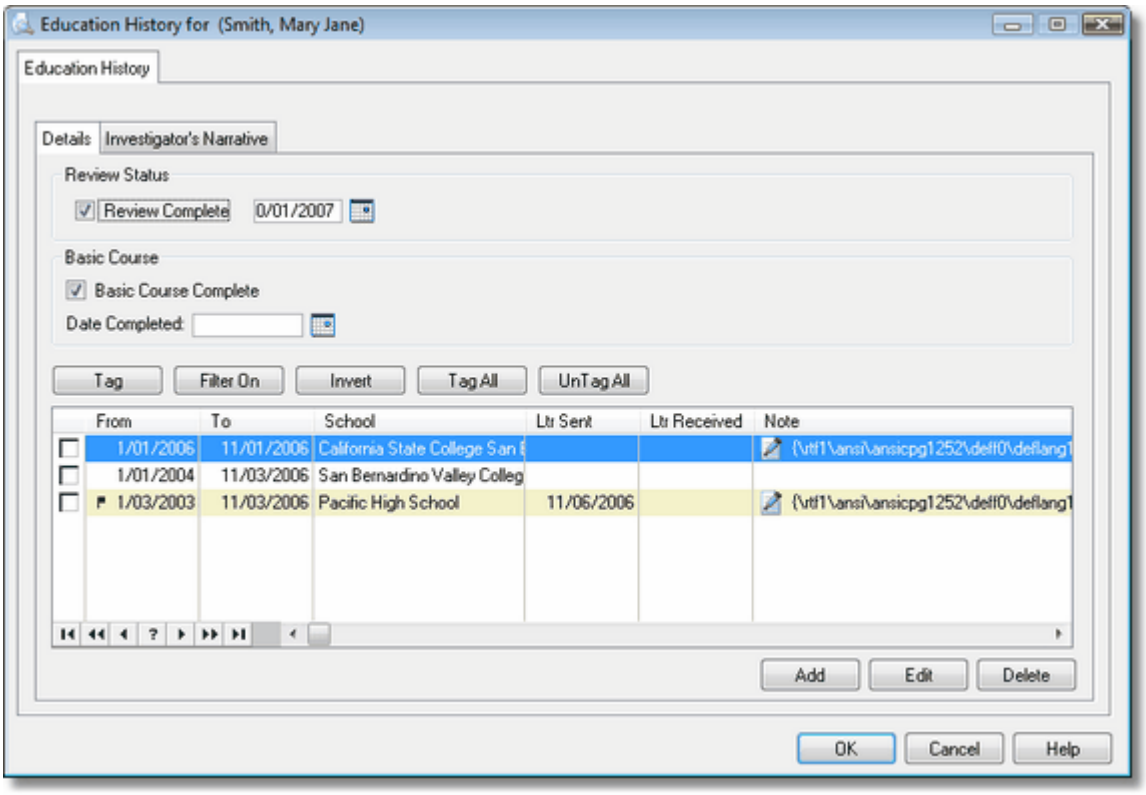

Education Tab

Each education item is entered or edited on the following screen.

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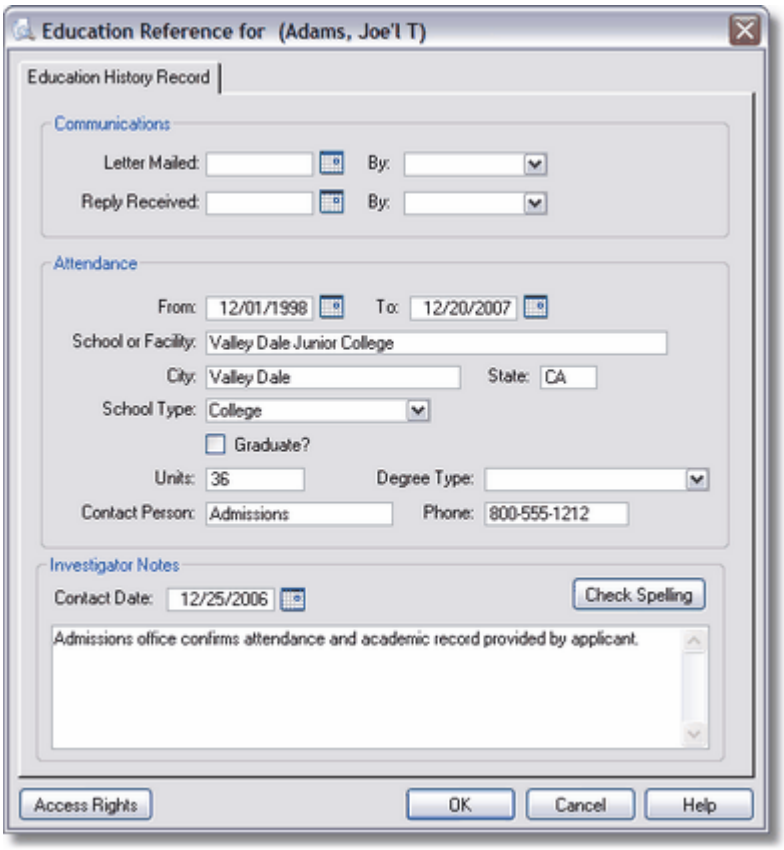

Education Record

3.2.6 Residence Tab

The Residence tab provides a list view of each prior residence submitted by the candidate. In this list, you can readily view whether correspondence has been sent and/or received. The list also provide an at-a-glance chronology of the candidate's prior residences.

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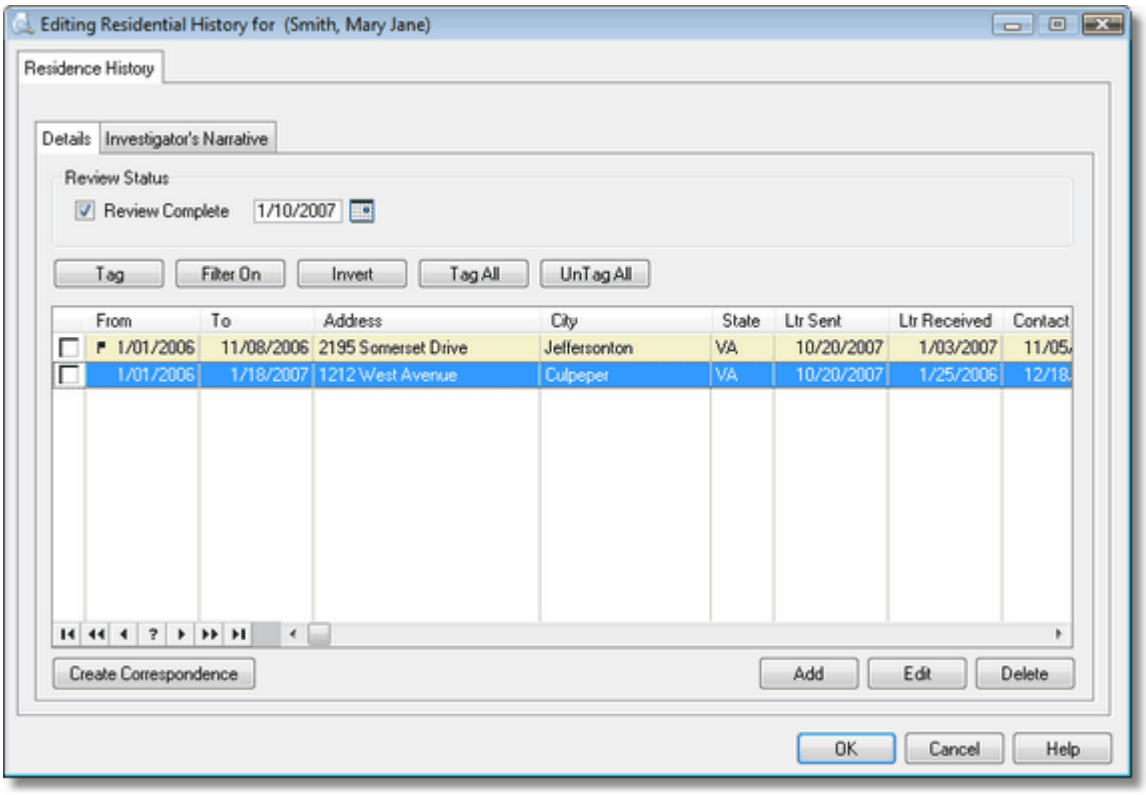

Residence Tab

Each residence item is entered or edited on the following screen.

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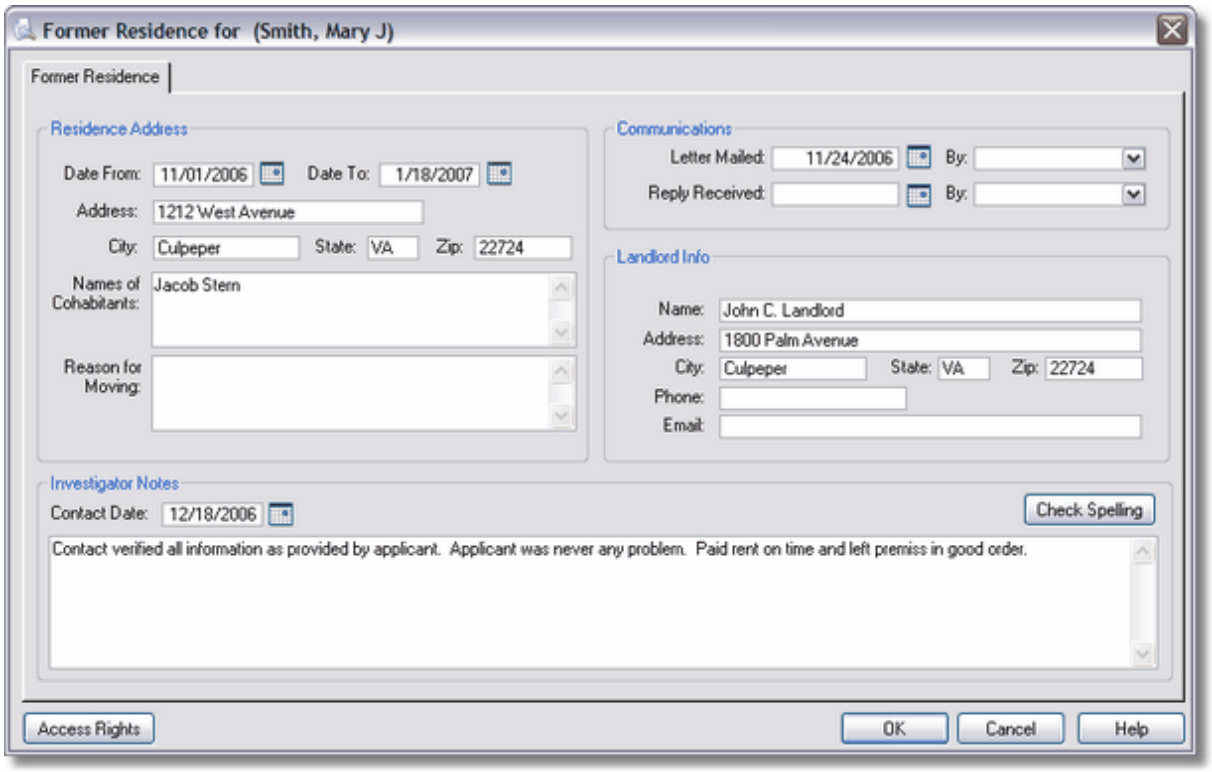

Residence Update Screen

3.2.7 Employment Tab

The Employment tab provides a list view of each prior employer submitted by the candidate. In this list, you can readily view whether correspondence has been sent and/or received. The list also provide an at-a-glance chronology of the candidate's prior employment.

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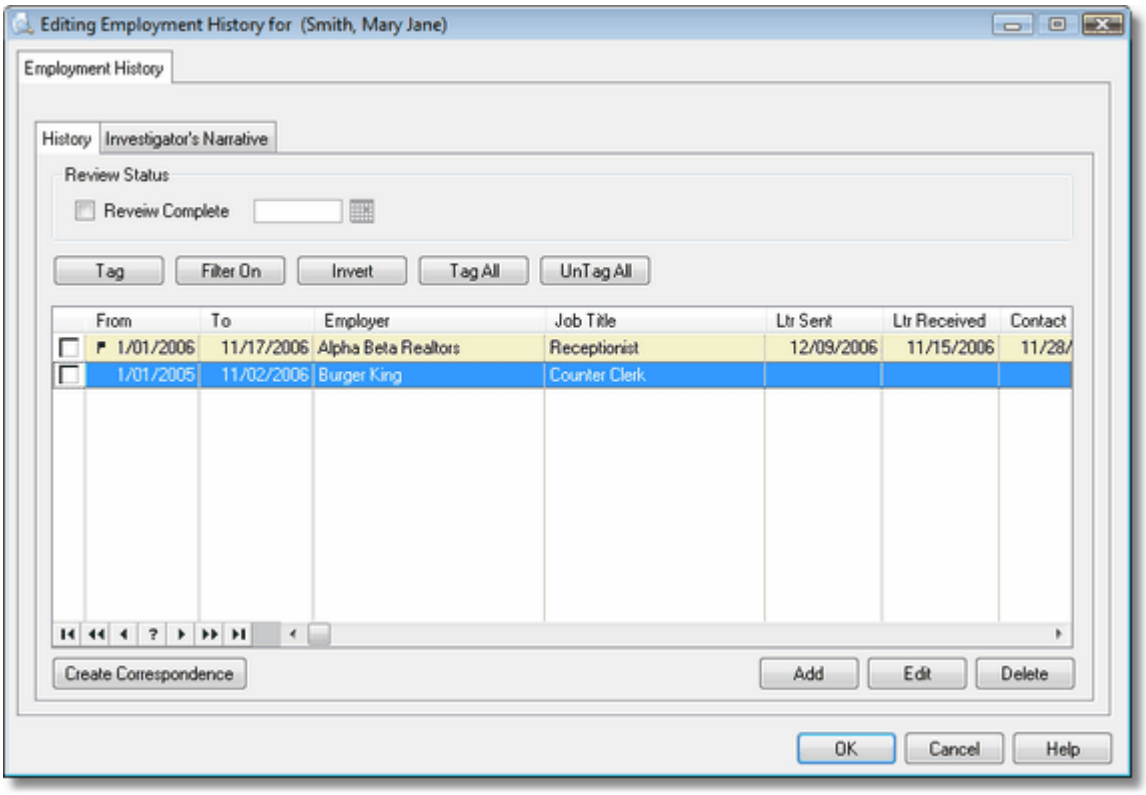

Employment Tab

Each residence item is entered or edited on the following screen.

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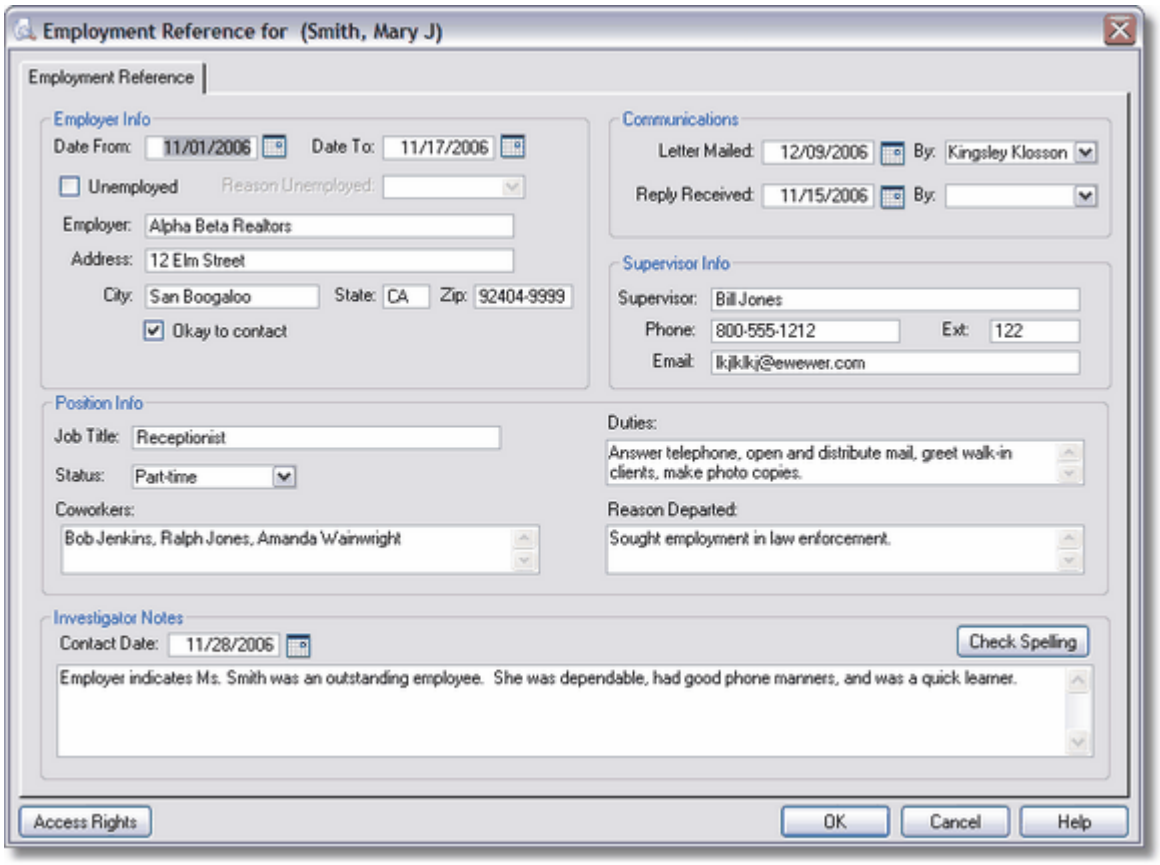

Employment Update Screen

3.2.8 Military History Tab

The Military tab provides for two general subjects related to military service; (1) proof of Selective Service Registration and (2) proof of active (or reserve) military service. It is possible that neither or both may apply to a candidate.

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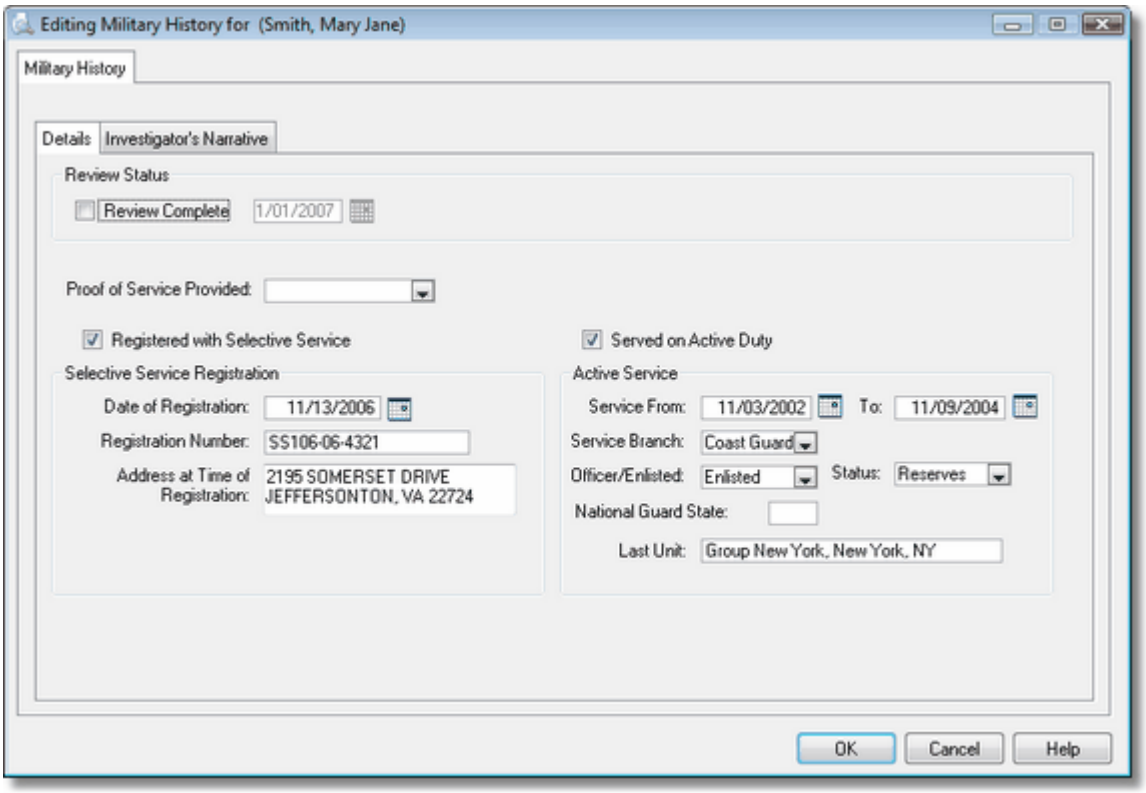

3.2.9 Financial Tab

The financial tab provides a review area for insurance and credit history verification. As with other investigative areas, there is a narrative tab where the financial narrative may be created.

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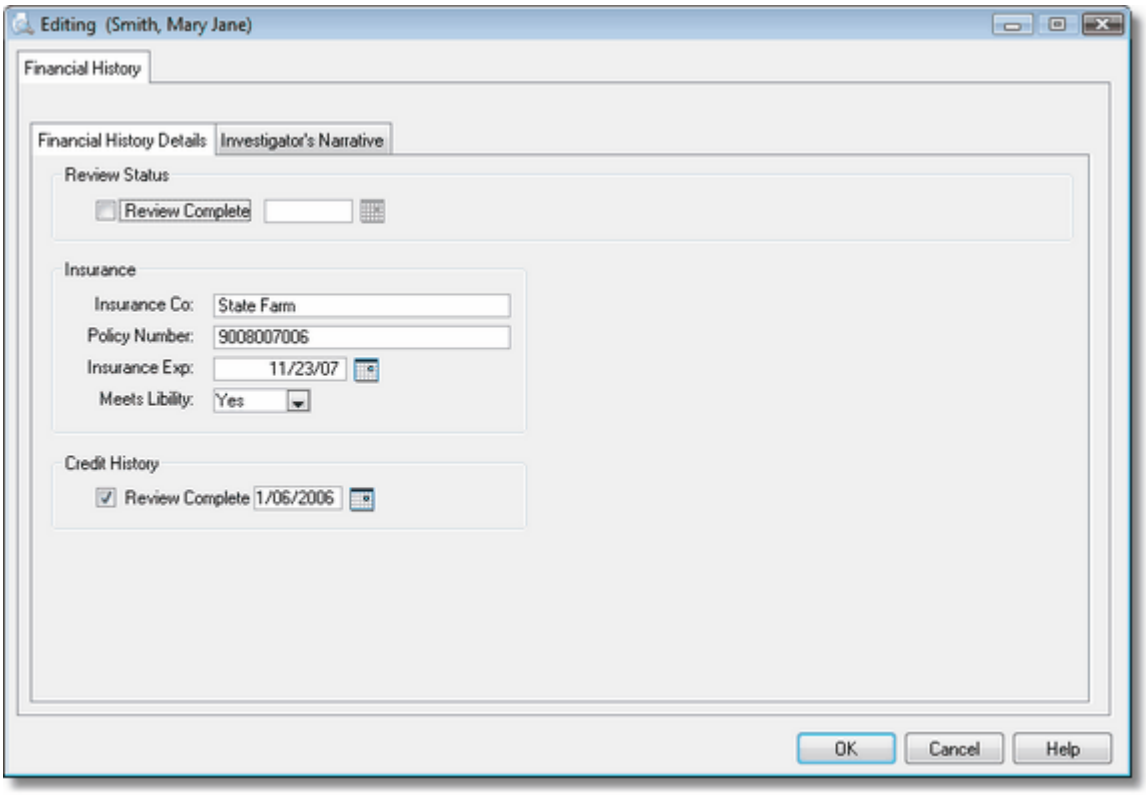

Financial Tab

3.2.10 Legal Tab

The Legal tab provides a check of items generally considered to be part of the legal history investigative area as shown below. As each items is checked or confirmed, the investigator can check off the item and provide a completion date. These items include various criminal background checks via databases, fingerprinting, and proof of citizenship. As with other investigative areas, there is a Narrative tab for the inclusion of narrative information relevant to this investigative area.

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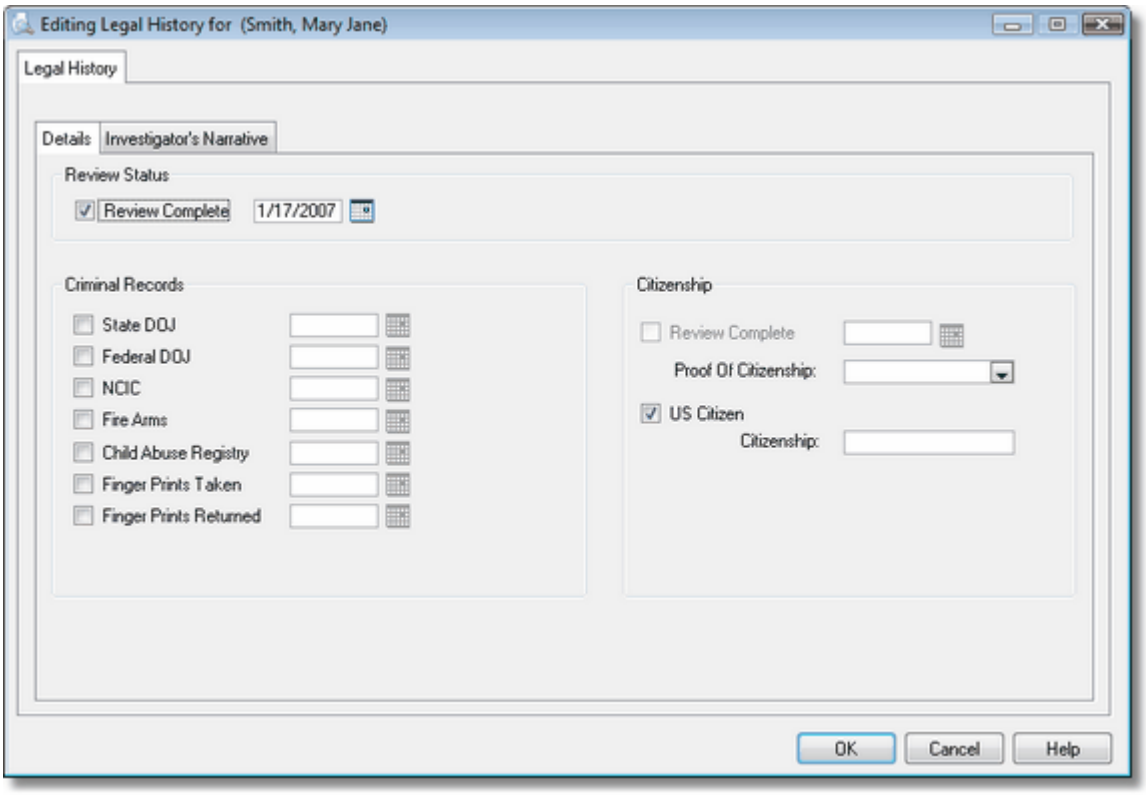

Legal Tab

3.2.11 Motor Vehicle Tab

The Motor Vehicle tab provides information regarding the candidate's current driver's license. The narrative tab provides the narrative text area for the investigator to make any remarks relevant to this investigative area.

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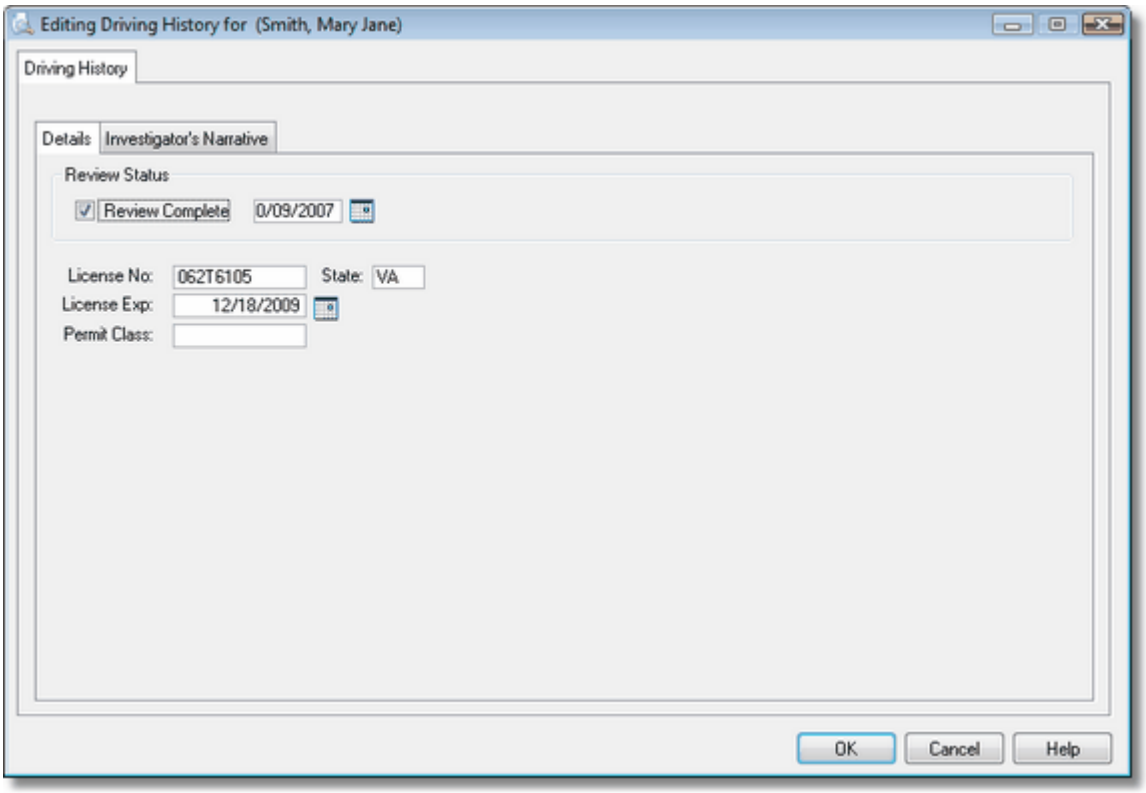

3.2.12 Examinations Tab

The Examinations tab provides checklists for various examinations including written, physical, psychological, and medical. For each examination type, check the check box to indicate the examination is completed and enter the date that the examination was considered complete by the investigator. The narrative tab provides an area for the investigator to write a narrative regarding all examinations.

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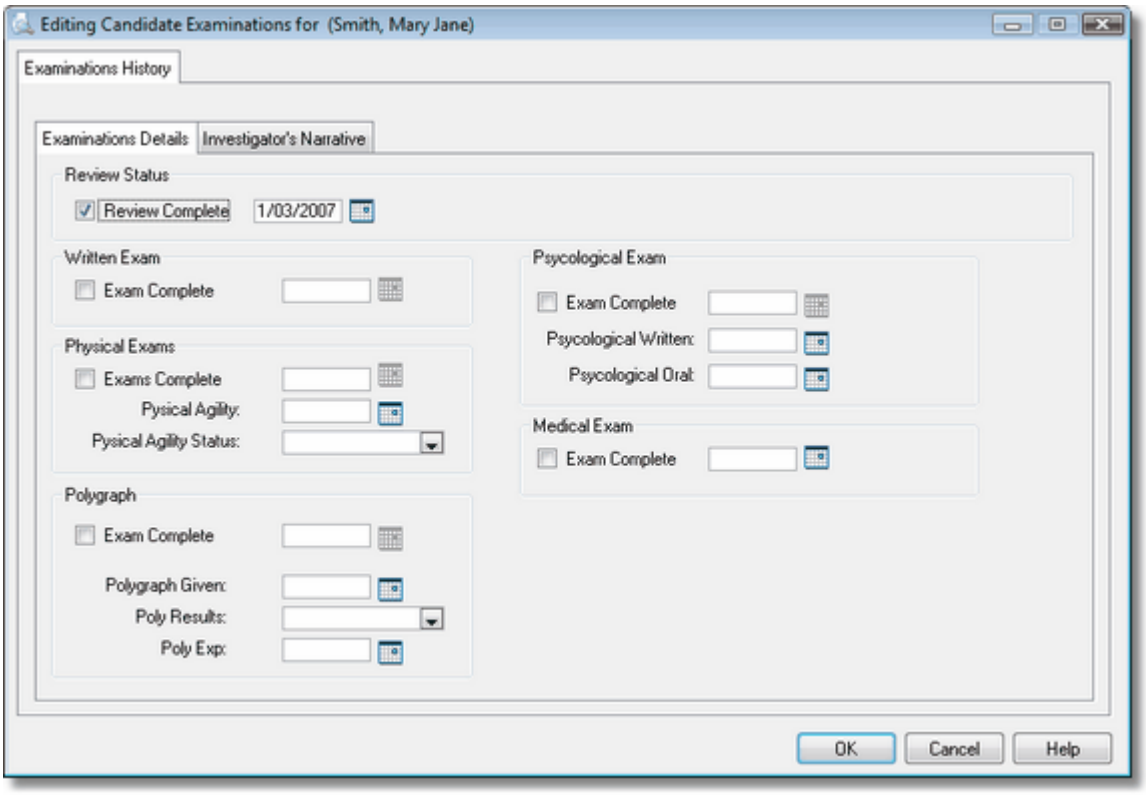

Examinations Tab

3.2.13 Interview Tab

The Interview tab provides a list of each interview conducted with the candidate. The list therefore provides a chronology of interviews.

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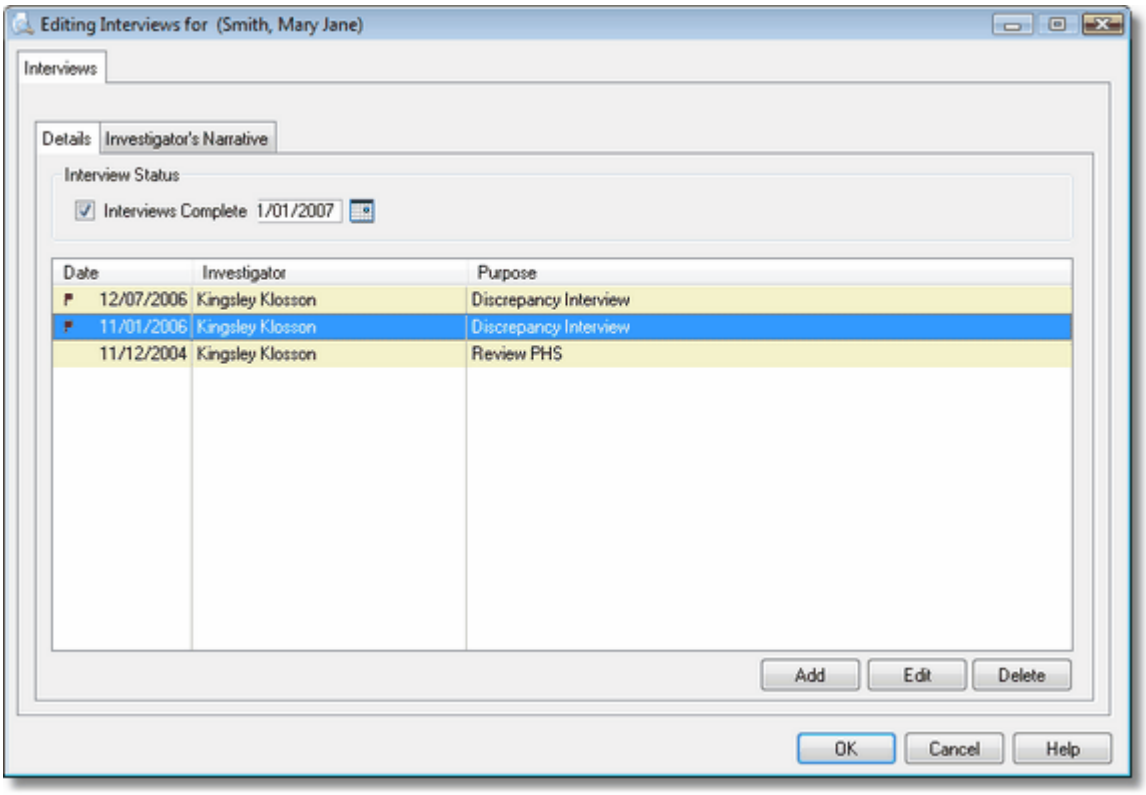

Interview Tab

Each interview item is entered or edited on the following screen.

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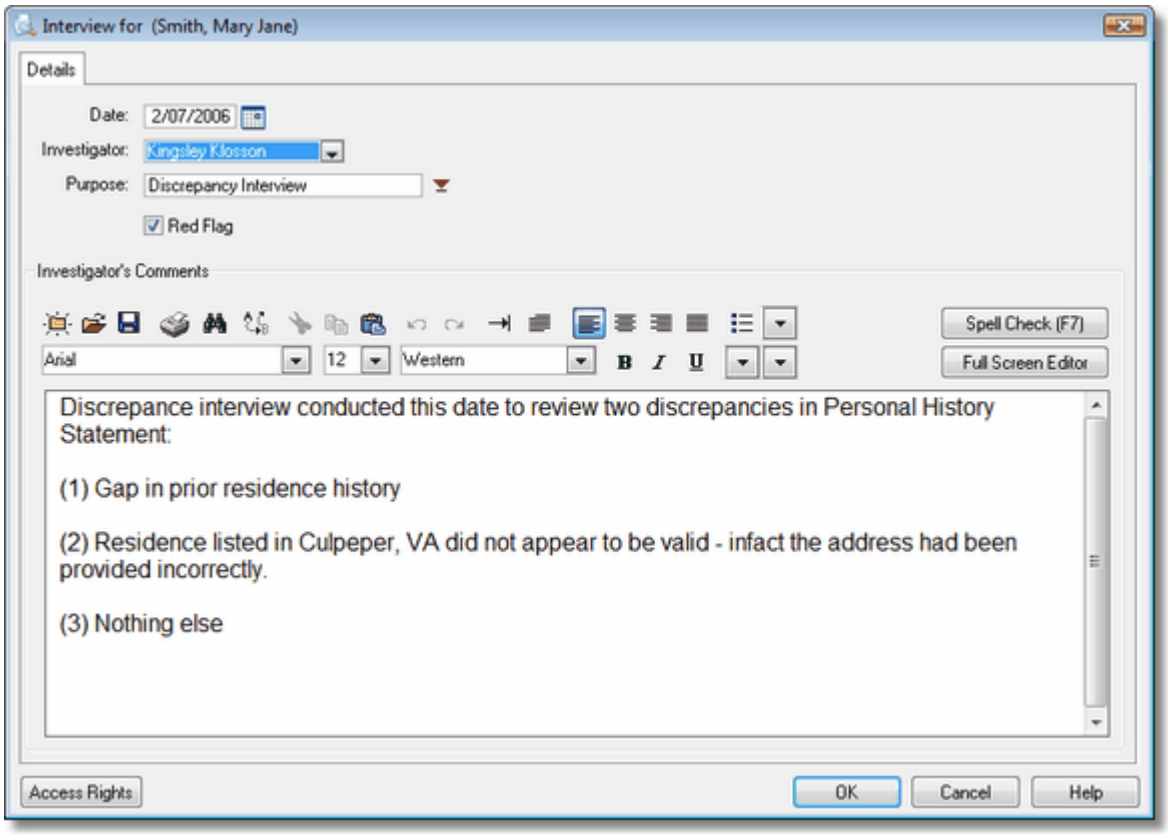


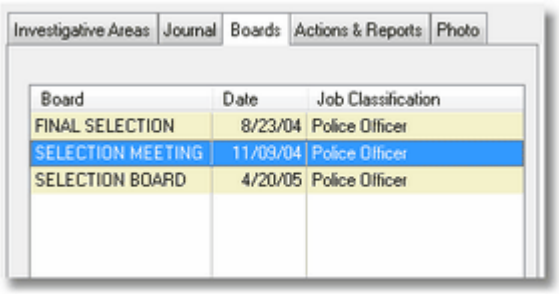
Interview Update Screen

3.2.14 Local Records Tab

This tab provides details of local record checks generally limited to the surrounding geographical area for your facility. Detail for this tab is currently under development and user input in this investigative area is encouraged.

3.2.15 Boards Tab

Candidates can be added to selection boards. A selection board in POBITS is analogous to any type of selection board process you may have for making hiring decisions. The purpose of this feature is to enable a view of candidate selection rates for each selection board. Of course you can also examine selection rates in total, exclusive of any selection boards. The use of Selection Boards in POBITS is completely optional.



Selection Boards Tab

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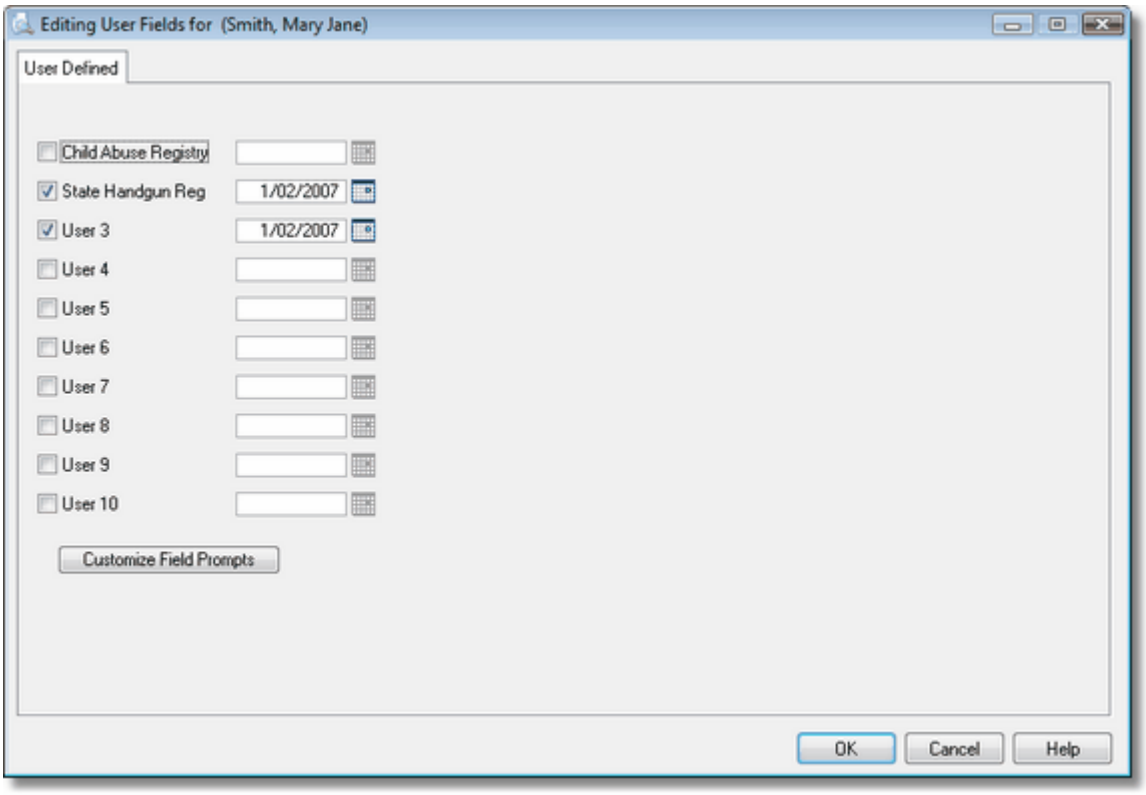
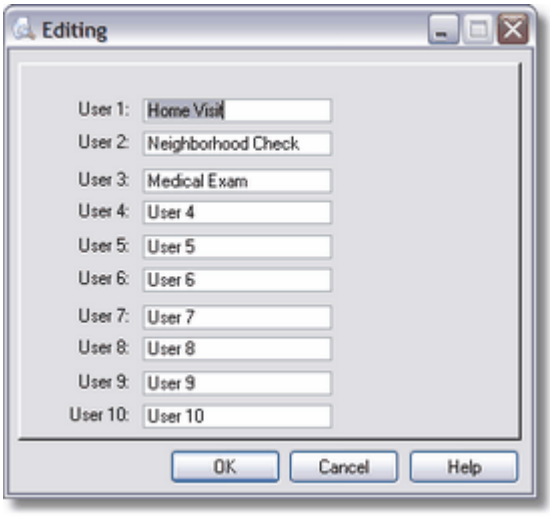
3.2.16 User Defined Tab

The User Defined tab contains 10 user-defined fields that you can use for special items specific to your needs. In the graphic below, the first four have been defined using the Customize Field Prompts function.



Candidate User Defined Tab

The prompts for each user-defined field can be changed by pressing the Customize Field Prompts button. As show below, just type in the name of that you wish to apply.



User-Defined Update Screen

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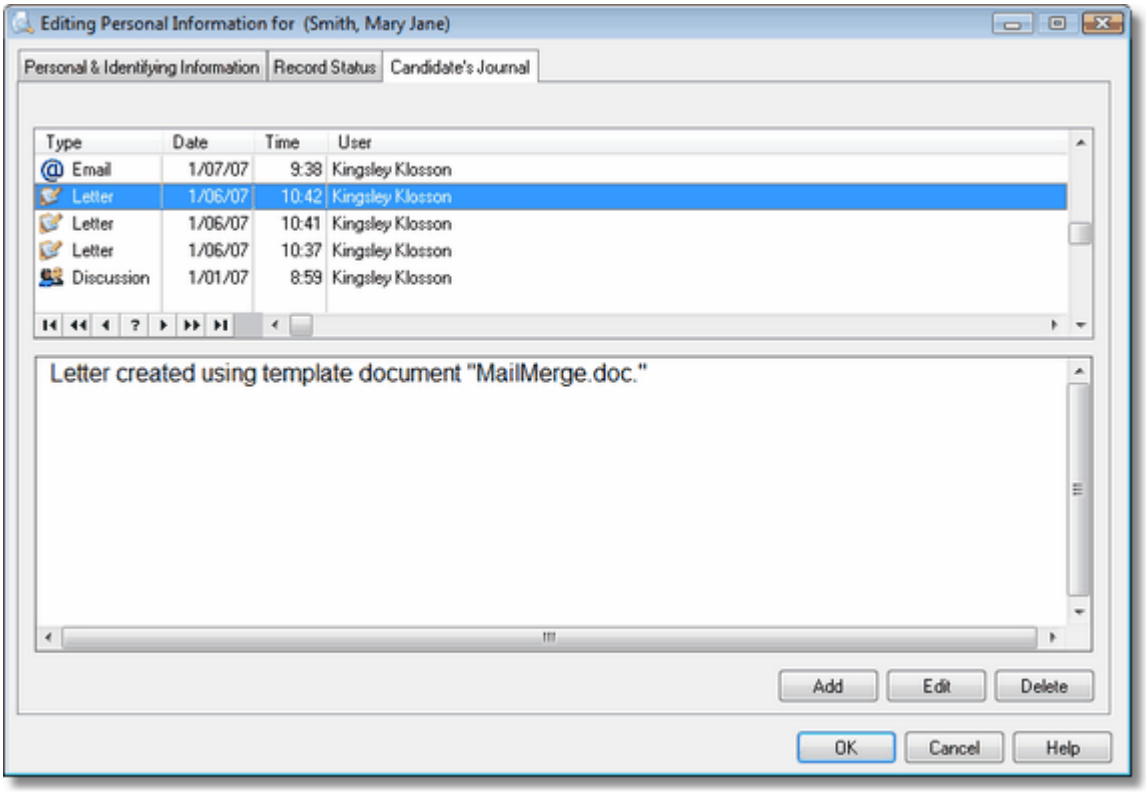
3.2.17 Journal Tab

The Journal tab contains a list of Journal entries for the candidate. Journal entries are made manually (by you) and automatically (by the program). Automatic entries occur for a few activities that POBITS can monitor and record an entry for. For example, when you create a mail merge letter for a candidate or group of candidates, POBITS optionally will enter a journal entry for this event. As you scroll through the list, the note text for the selected journal entry is visible in the screen below the list. When you want to enter a journal entry manually, you will do it from this tab. Use the Add button to make a new journal entry.



Candidate Journal Tab

Journal entries are for entering anything pertinent to the background investigation or to the process for conducting it. For example, if the investigation is on hold pending the delivery of some documentation from the candidate, a journal entry would be the appropriate place to record this fact. Each journal entry can be typed as a Letter, Phone Call, Fax, Email, Discussion, or Note and will be automatically attributed to the signed on user. The journal entry supports rich text so you can embellish your journal entry with font and paragraph attributes if you desire or copy and paste from other applications such as an email message or electronic document and retain formatting attributes. The journal entry screen is below:

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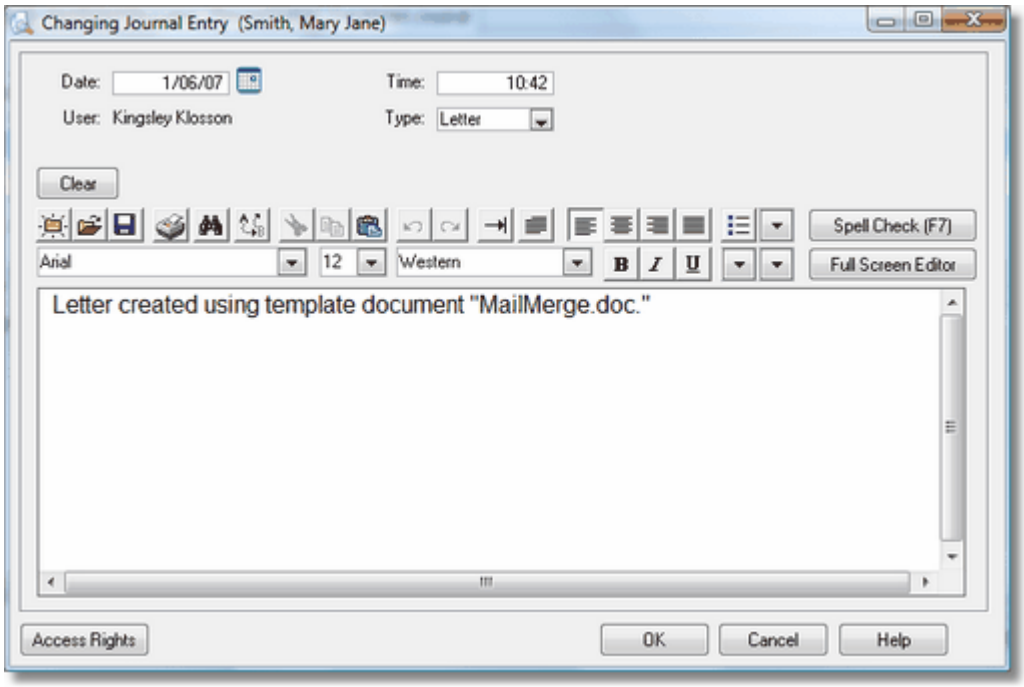

Journal Window

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Narratives and Comments

4 Narratives and Comments

Throughout POBITS, the investigator has the ability to enter Narratives and Comments. These two types of entries are distinct. For example, on the subject of past employment, each past employment record provides the ability to enter a *comment*. You can also apply a red flag to any comment. These comments serve as the investigator's notes about this one term of employment. On the Employment History investigative Area, there is a tab section for the investigator to enter their *Narrative* as it relates to entire subject of the Candidate's past employment history. This working paradigm exists in many investigative areas throughout POBITS.

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Miscellaneous Functions

Part V

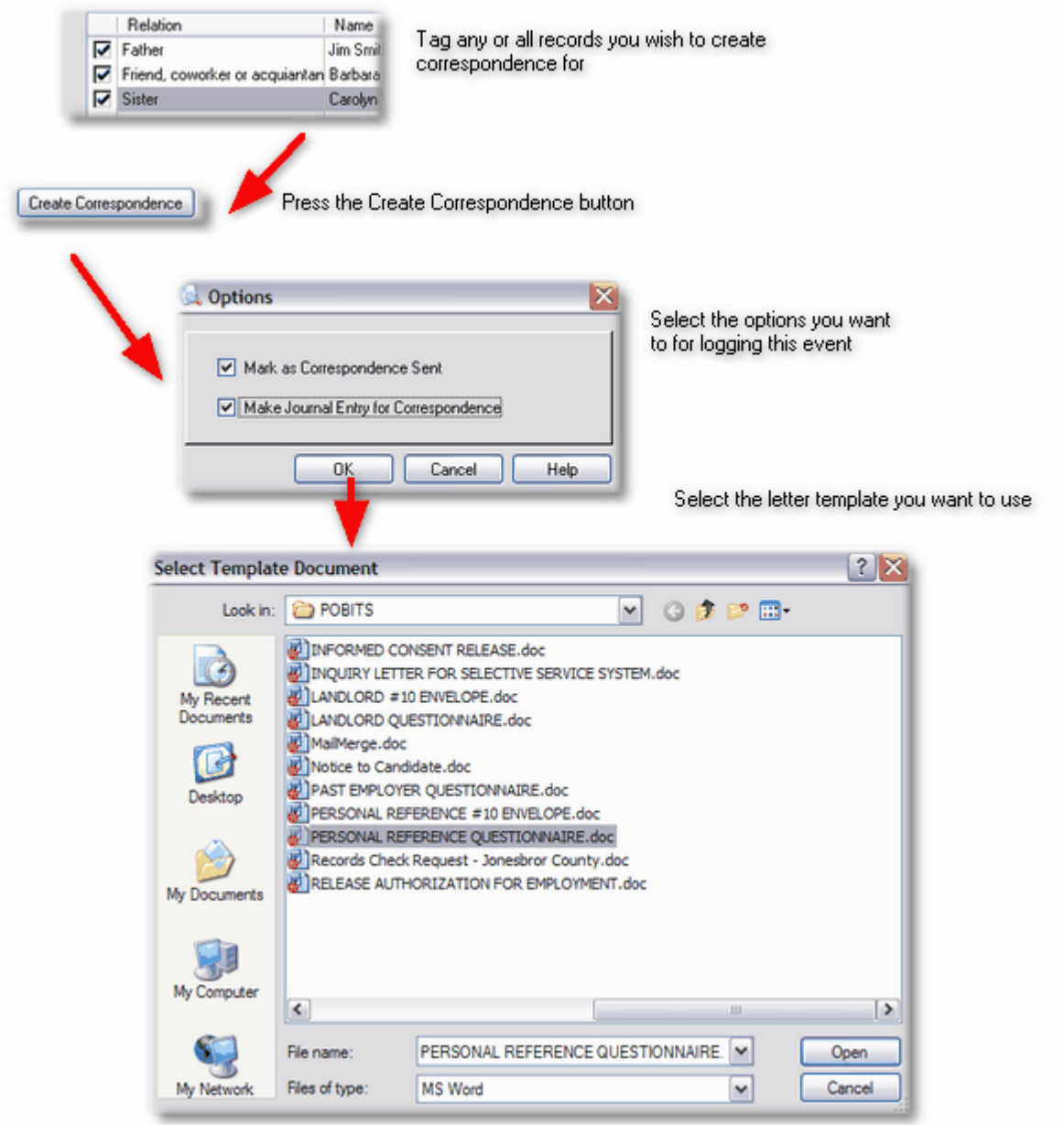
Miscellaneous Functions

5 Miscellaneous Functions

Enter topic text here.

5.1 Creating Correspondence

There are three subject areas within the candidate information that enable you to generate and track correspondence to individuals or entities that can provide relevant information for you investigation. The process for creating correspondence is the same for each of them. The diagram below shows this process.



Create Correspondence Process

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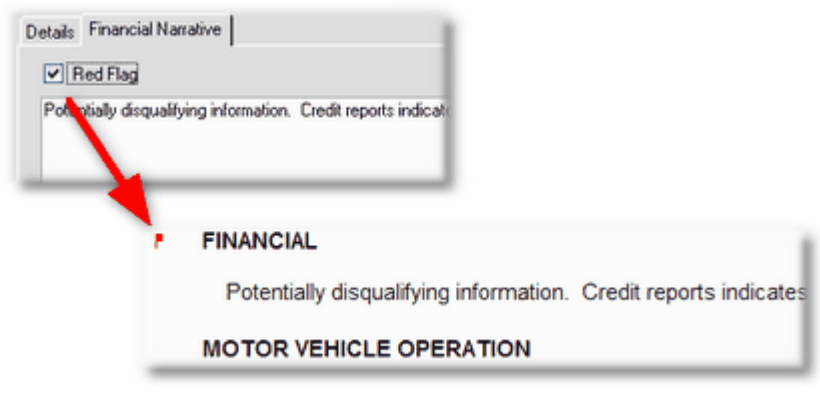
5.2 Red Flag Check Boxes

Throughout POBITS there are a number of areas where potentially disqualifying information, or some other discrepancy in the information can be flagged using the Red Flag check box. Each investigative area has a narrative section and a Red Flag check box for this purpose. This is a useful visual indicator when viewing the record and will also appear on the Narrative Reports generated by POBITS.



Red Flag on Screen and Reports

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Reports

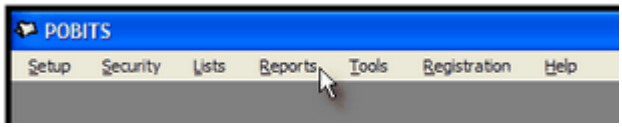
Part VI

Reports

6 Reports

6.1 General

There are two location in POBITS from which you can select to run a report. One location is the Reports menu on the Main POBITS menu bar. The second is the Action tab on the Candidate list. The reports on the Reports menu are global in scope - meaning they report on all data in your candidate database. The reports on the Action tab are centric to whichever candidates are tagged in the list.

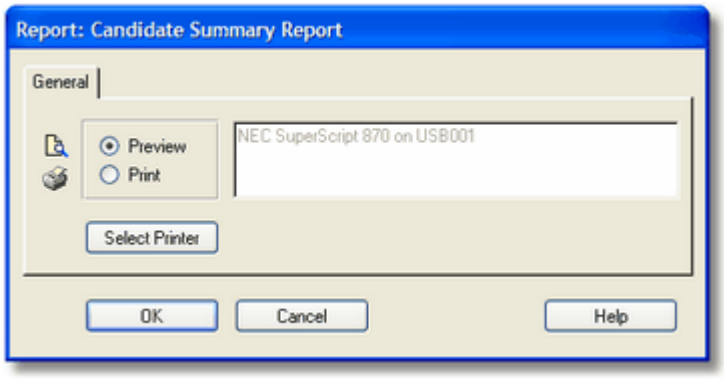


Report menu

Action Tab

6.2 Predestination Dialog

Before each report runs, you have the option select the destination; Preview or Print. You can also select the default printer at this point and in fact, if you will want to print to anything other than the default printer, you will need to select it at this point.



Report Pre-destination Dialog

6.3 Previewing

All reports can be previewed prior to printing and the report previewer has extensive function for viewing, finding, removing pages, printing, etc. The best way to discover these features is to use them. Placing your mouse pointer over each button will reveal the functionality in the tool tip.

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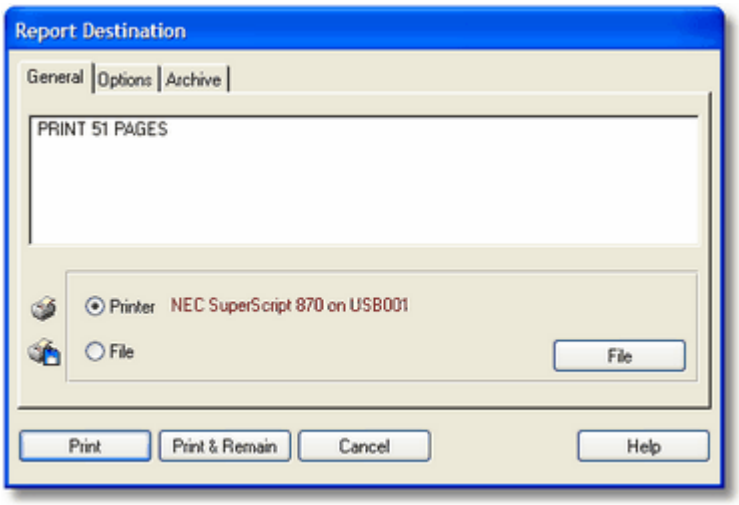
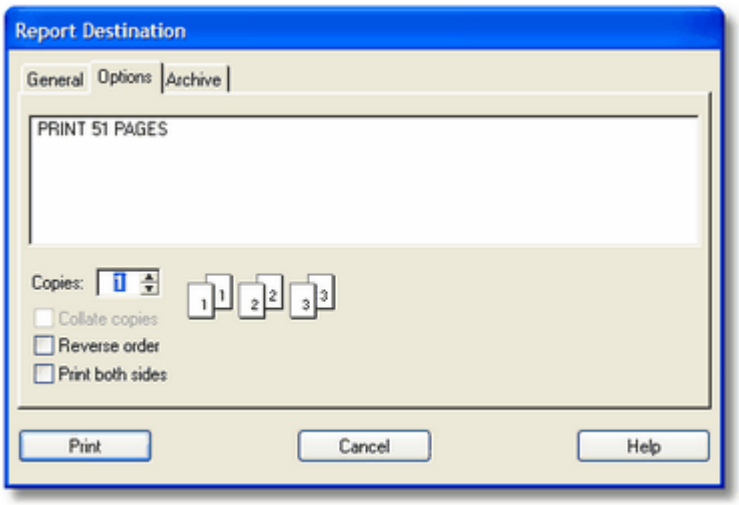
Report Review Toolbar

6.4 Print Destination Dialog

Once you decide to print either from the predestination dialog or from the report previewer, the Report Destination dialog will be displayed. Several options are available on this dialog for printing, printing to file, collating, and archiving.



Report Destination Dialog - General



Report Destination Dialog - Options

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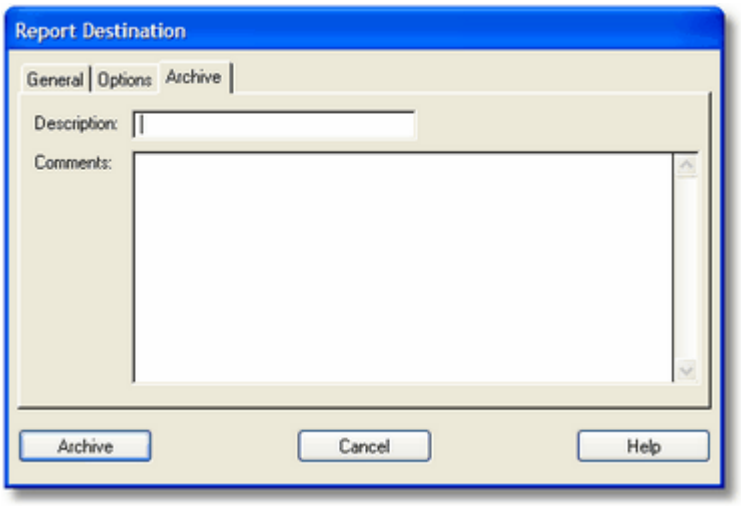

Report Destination Dialog - Archive

6.5 Archiving Reports

When you elect to print a report from the print preview, you have the option to archive the report. The archiving function works like a snapshot - the entire contents of the report are archived. It's not like saving a template, it is like storing the report output in a safe place. You may find this function useful. To archive a report, generate the report of your choice. On the Print Destination dialog 51, select the Archive tab. Enter a description and any comments you like and press the Archive button. Any time you attempt to print this report again, you will see a Retrieve button on the Pre-destination dialog 50. Use that button to retrieve a previously archived report.

6.6 Candidate Summary Report

The Candidate Summary report displays the primary information about the candidate including the status of all check-off items. It also displays all Journal entries. To print the Candidate Summary, filter your candidate records as necessary, then tag any candidates you wish to print a summary report for, then on the Actions tab, press the Summary button.

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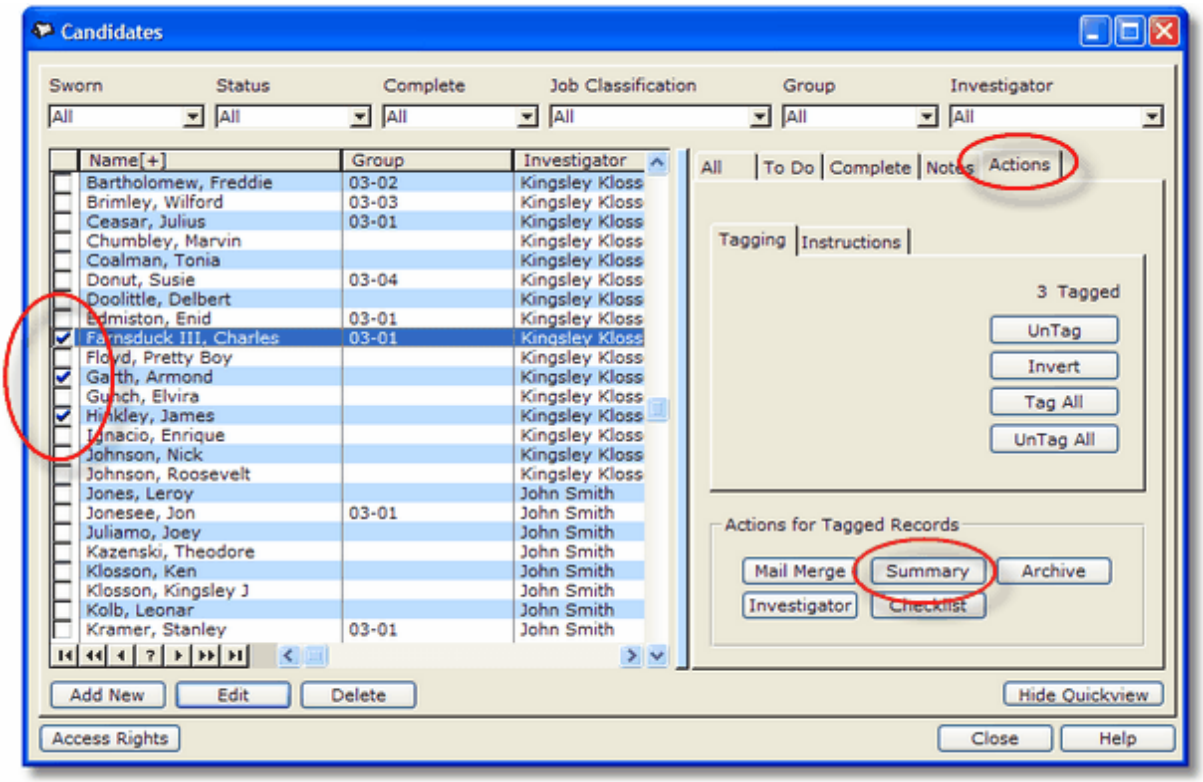

Printing the Candidate Summary Report

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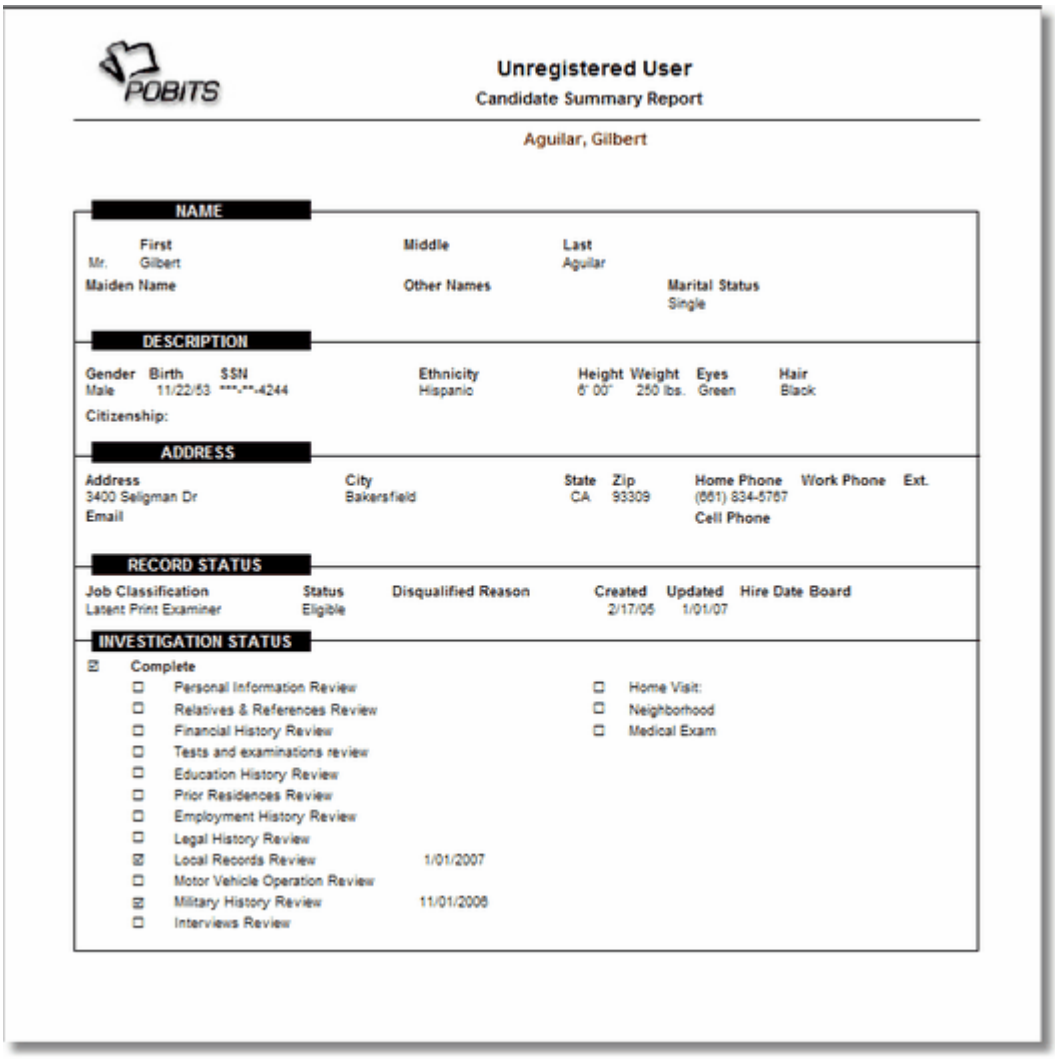

POBITS

Unregistered User

Candidate Summary Report

Aguilar, Gilbert

NAME

	First	Middle	Last
Mr.	Gilbert		Aguilar

Maiden Name | Other Names | Marital Status: Single

DESCRIPTION

Gender	Birth	SSN	Ethnicity	Height	Weight	Eyes	Hair
Male	11/22/53	***-**-4244	Hispanic	6' 00"	250 lbs.	Green	Black

Citizenship:

ADDRESS

Address	City	State	Zip	Home Phone	Work Phone	Ext.
3400 Seligman Dr	Bakersfield	CA	93309	(661) 834-5767		

Email | Cell Phone

RECORD STATUS

Job Classification	Status	Disqualified Reason	Created	Updated	Hire Date	Board
Latent Print Examiner	Eligible		2/17/05	1/01/07		

INVESTIGATION STATUS

☑ Complete

☐	Personal Information Review		
☐	Relatives & References Review		
☐	Financial History Review		
☐	Tests and examinations review		
☐	Education History Review		
☐	Prior Residences Review		
☐	Employment History Review		
☐	Legal History Review		
☑	Local Records Review	1/01/2007	
☐	Motor Vehicle Operation Review		
☑	Military History Review	11/01/2006	
☐	Interviews Review		

☐ Home Visit:
☐ Neighborhood
☐ Medical Exam

Candidate Summary Report

6.7 Checklist Report

The checklist report displays a simple checklist grid of with all of the checklist items for each candidate tagged in the candidate list. To print the report:

1. Open the candidate list
2. Select the Action tab on the Quickview tab
3. Tag all the candidates you want to see in the report
4. Press the Checklist button on the Action tab.

The report appears as shown below.

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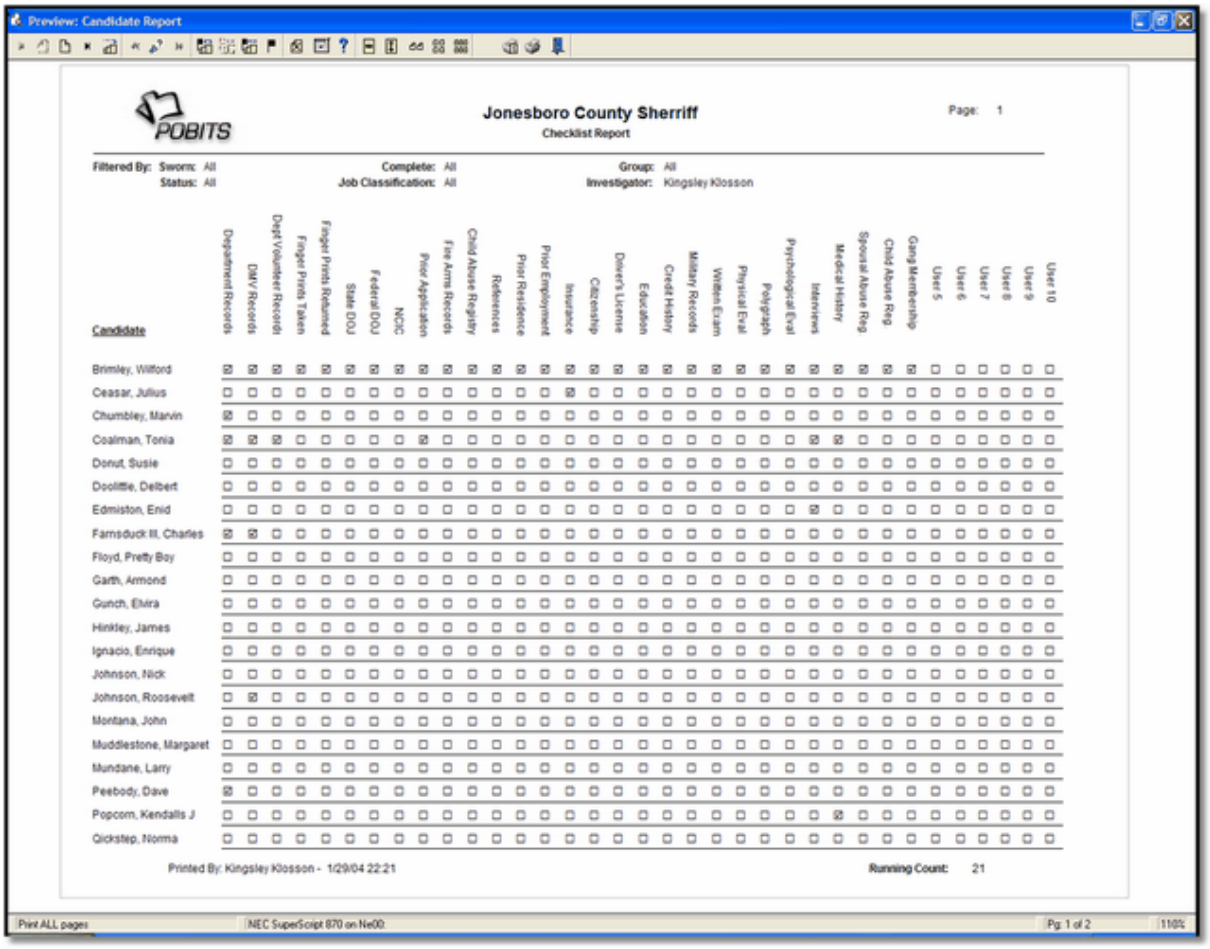

Candidate Checklist Report

6.8 Ineligibility Report by Reason

The Ineligibility Report by Reason provides a breakdown of the percentages of candidates who are deemed ineligible by each reason defined in your POBITS system. If further shows a breakdown of Male and Female for each reason. The pie graph displays a simple graphic to easily see the proportions according to each reason. On the right of the graph are some metrics that can be used to compare to the data above. For example, if there is a high percentage of females ineligible for some particular reason, it will be significant to know the total percentages of females in the database.

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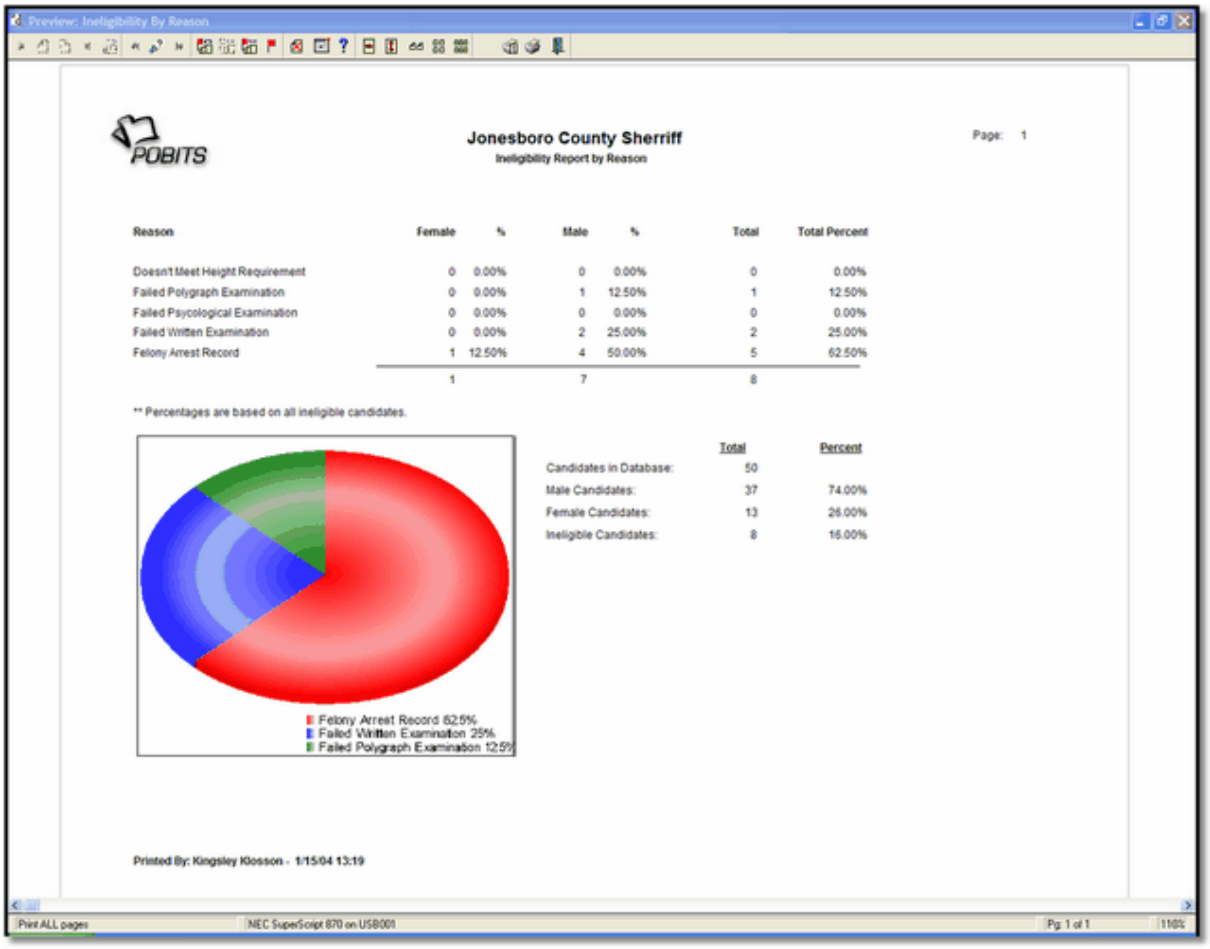
Preview: Ineligibility By Reason
POBITS
Jonesboro County Sherriff
Ineligibility Report by Reason
Page: 1
Reason Female % Male % Total Total Percent
Doesn't Meet Height Requirement 0 0.00% 0 0.00% 0 0.00%
Failed Polygraph Examination 0 0.00% 1 12.50% 1 12.50%
Failed Psycological Examination 0 0.00% 0 0.00% 0 0.00%
Failed Written Examination 0 0.00% 2 25.00% 2 25.00%
Felony Arrest Record 1 12.50% 4 50.00% 5 62.50%
1 7 8
** Percentages are based on all ineligible candidates.
Total Percent
Candidates in Database: 50
Male Candidates: 37 74.00%
Female Candidates: 13 26.00%
Ineligible Candidates: 8 16.00%
Felony Arrest Record 62.5%
Failed Written Examination 25%
Failed Polygraph Examination 12.5%
Printed By: Kingsley Klosson - 1/15/04 13:19
Print ALL pages
NEC SuperScript 870 on USB001
Pg: 1 of 1
110%

Ineligibility Report by Reason

6.9 Ineligibility Report by Ethnicity

This reports is very similar to the Ineligibility Report by Reason, except that the breakdown is by Ethnicity.

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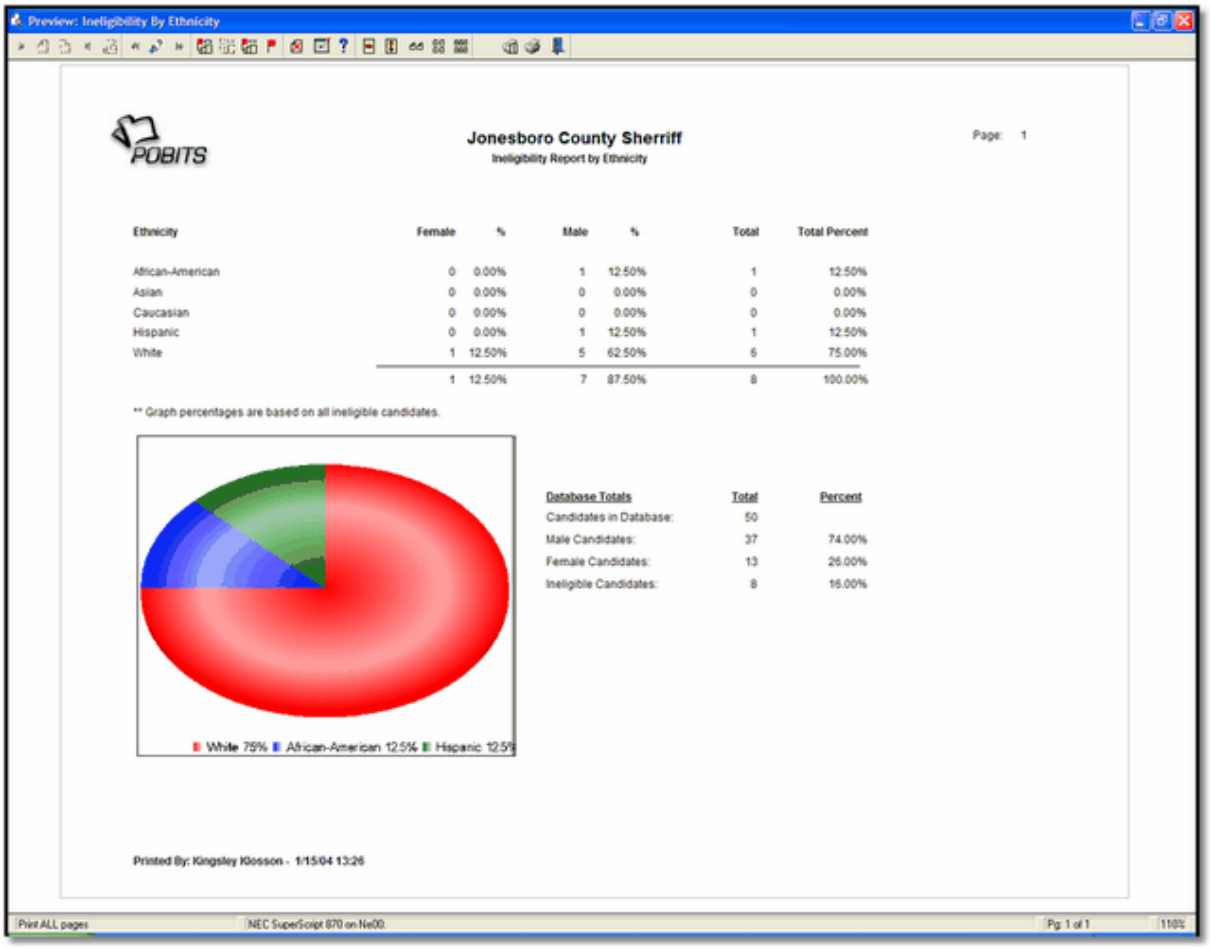
Preview: Ineligibility By Ethnicity
POBITS
Jonesboro County Sherriff
Ineligibility Report by Ethnicity
Page: 1
Ethnicity Female % Male % Total Total Percent
African-American 0 0.00% 1 12.50% 1 12.50%
Asian 0 0.00% 0 0.00% 0 0.00%
Caucasian 0 0.00% 0 0.00% 0 0.00%
Hispanic 0 0.00% 1 12.50% 1 12.50%
White 1 12.50% 5 62.50% 6 75.00%
1 12.50% 7 87.50% 8 100.00%
** Graph percentages are based on all ineligible candidates.
White 75% African-American 12.5% Hispanic 12.5%
Database Totals Total Percent
Candidates in Database: 50
Male Candidates: 37 74.00%
Female Candidates: 13 26.00%
Ineligible Candidates: 8 16.00%
Printed By: Kingsley Klosson - 1/15/04 13:26
Print ALL pages
NEC SuperScript 870 on Ne00:
Pg: 1 of 1
110%

Ineligibility Report by Ethnicity

6.10 Selection Board Roster

The selection board roster displays the details about the selection board and a list of all candidates assigned to the board. A check box is provided by each name as a tool to record their selection and then bring back to POBITS to mark the selected candidates as hired.

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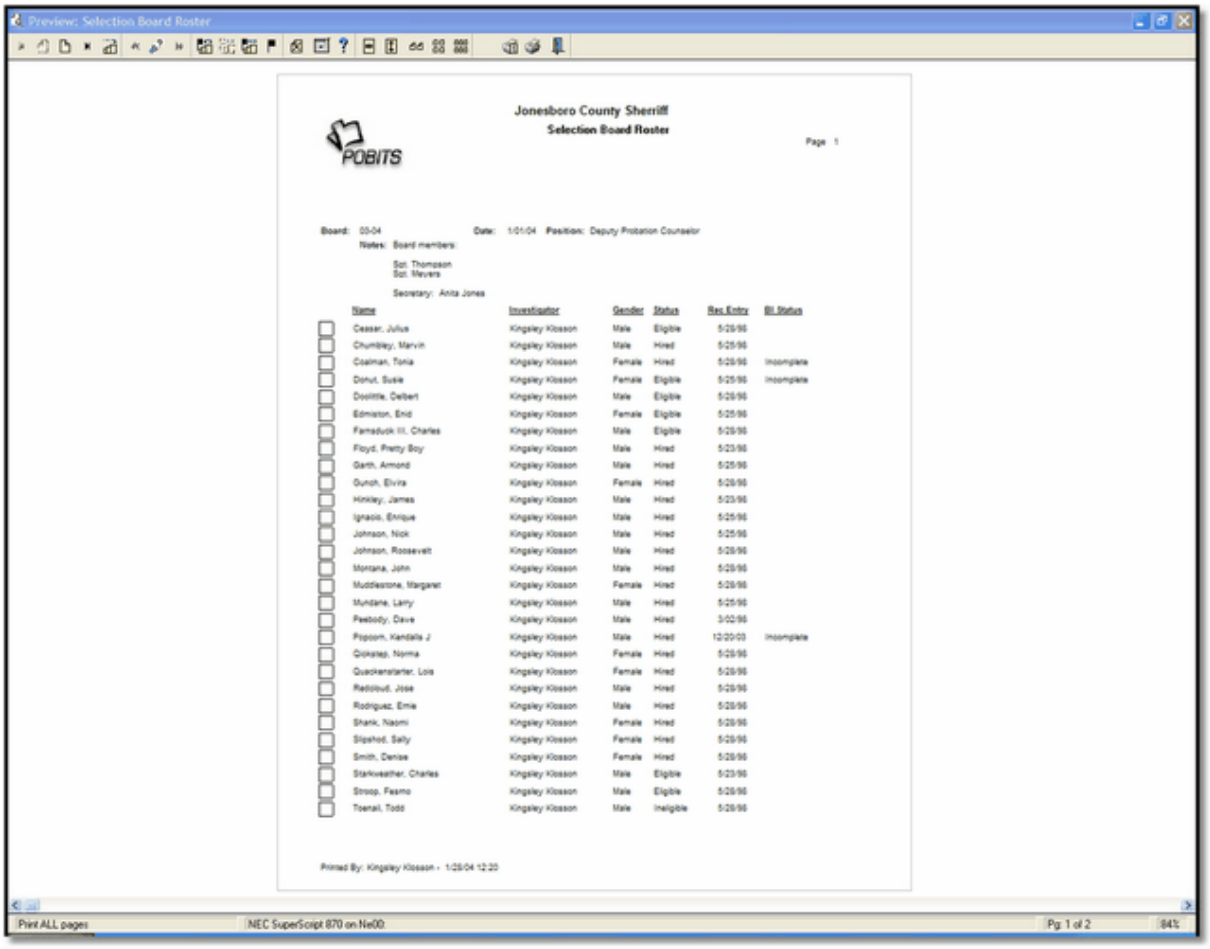

Selection Board Roster Report

6.11 Opportunity of Selection

The Opportunity of Selection Report is a reporting of how candidates were selected for hire on the basis of ethnicity and gender. To produce this report, you must properly define selection boards and add to those boards each candidate considered by the board. When selections are made, you must then change each selected candidate's Status attribute to Hired. When these steps are completed, an Opportunity of Selection Report can be produced for the selection board.

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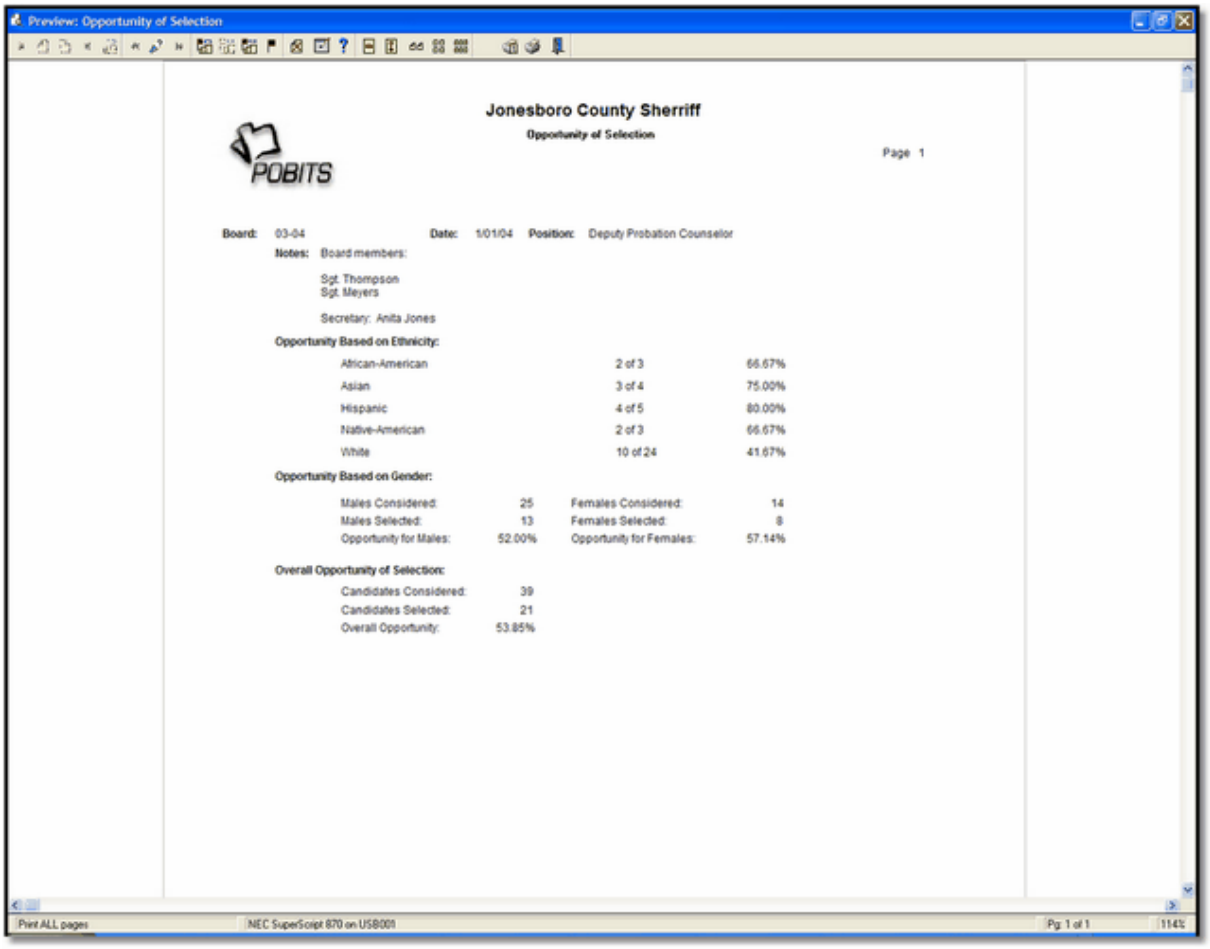

Opportunity of Selection Report

6.12 Opportunity of Selection For a Job Classification

This Opportunity of Selection Report is a similar to the previous report except that the previous report focuses on the outcome of a particular selection board whereas this reports focuses on the overall opportunity for all candidates applying for a certain position. When selecting this report, you will select a singles job classification as the focus of the report.

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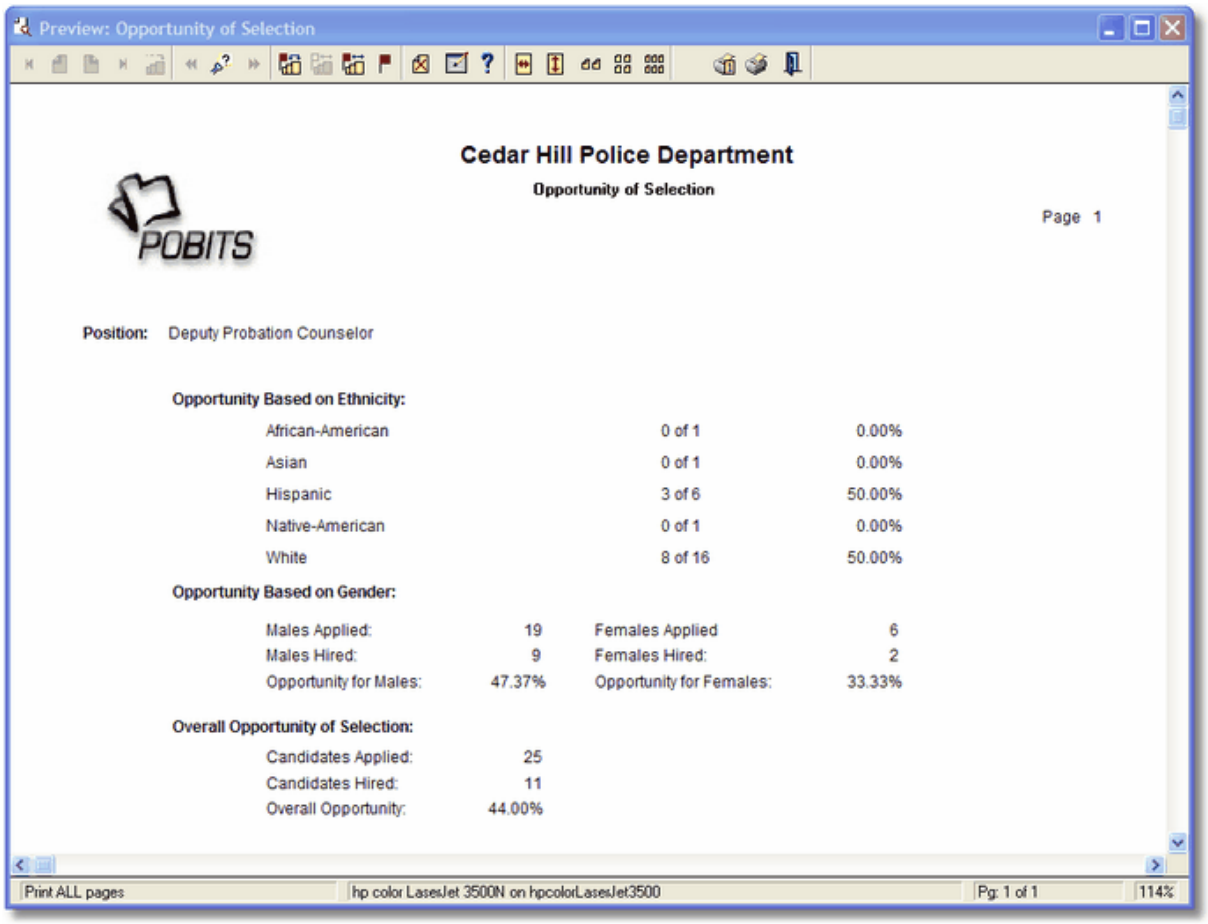
Preview: Opportunity of Selection
Cedar Hill Police Department
Opportunity of Selection
Page 1
POBITS
Position: Deputy Probation Counselor
Opportunity Based on Ethnicity:
African-American 0 of 1 0.00%
Asian 0 of 1 0.00%
Hispanic 3 of 6 50.00%
Native-American 0 of 1 0.00%
White 8 of 16 50.00%
Opportunity Based on Gender:
Males Applied: 19 Females Applied 6
Males Hired: 9 Females Hired: 2
Opportunity for Males: 47.37% Opportunity for Females: 33.33%
Overall Opportunity of Selection:
Candidates Applied: 25
Candidates Hired: 11
Overall Opportunity: 44.00%
Print ALL pages
hp color LaserJet 3500N on hpcolorLaserJet3500
Pg: 1 of 1
114%

Opportunity of Selection for a Job Classification

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Part VII

Selection Boards

7 Selection Boards

7.1 Selection Boards - General

Selection Boards are optional and to some extent they transcend the background investigation process. Once a candidate's background investigation is COMPLETE and the candidate is ELIGIBLE, you can include them on a selection board. Once the selection board has made their determinations, by marking the hired candidates as HIRED, you can easily produce Opportunity of Selection Reports.

Rules about Selection Boards (from the software's standpoint):

1. You may create any number of selection boards.
2. A selection board is deemed to exist for the purpose of selecting candidates for one particular Job Classification 65.
3. You may assign any number of candidates to a selection board.
4. A candidate may be assigned to any number of selection boards.

You can define a selection board to reflect the selection processes that occur for selecting candidates for hire. Each selection board has a few primary details and then a roster of candidates to be selected by the board. It is easy to add candidates to any selection board from the candidate list - see the topic Adding To Selection Board 16 for the Actions Tab. You can also add candidates to a board opening a selection board record and pressing the Add button. Then select a candidate to add and press OK.

The Selection Board subject area enables you to maintain historical data about board selections. Additionally, once candidates are hired and their records are updated to indicate such, POBITS can produce reports that detail the opportunity of selection 58 based on ethnicity and gender. Note that the intent within POBITS is that each selection board is assembled to select candidates for a specific position. If your board assembles to select candidates for a variety of positions, you will need to create a separate board (within POBITS) for each selection process. Fortunately, creating a selection board and adding candidates to it is very simple to do.

You can remove candidates from selection boards individually or you can remove all candidates at once by using either the Remove or Remove All buttons. Note that this only removes a candidate from a selection board - you are not deleting or changing the candidate record in any way.

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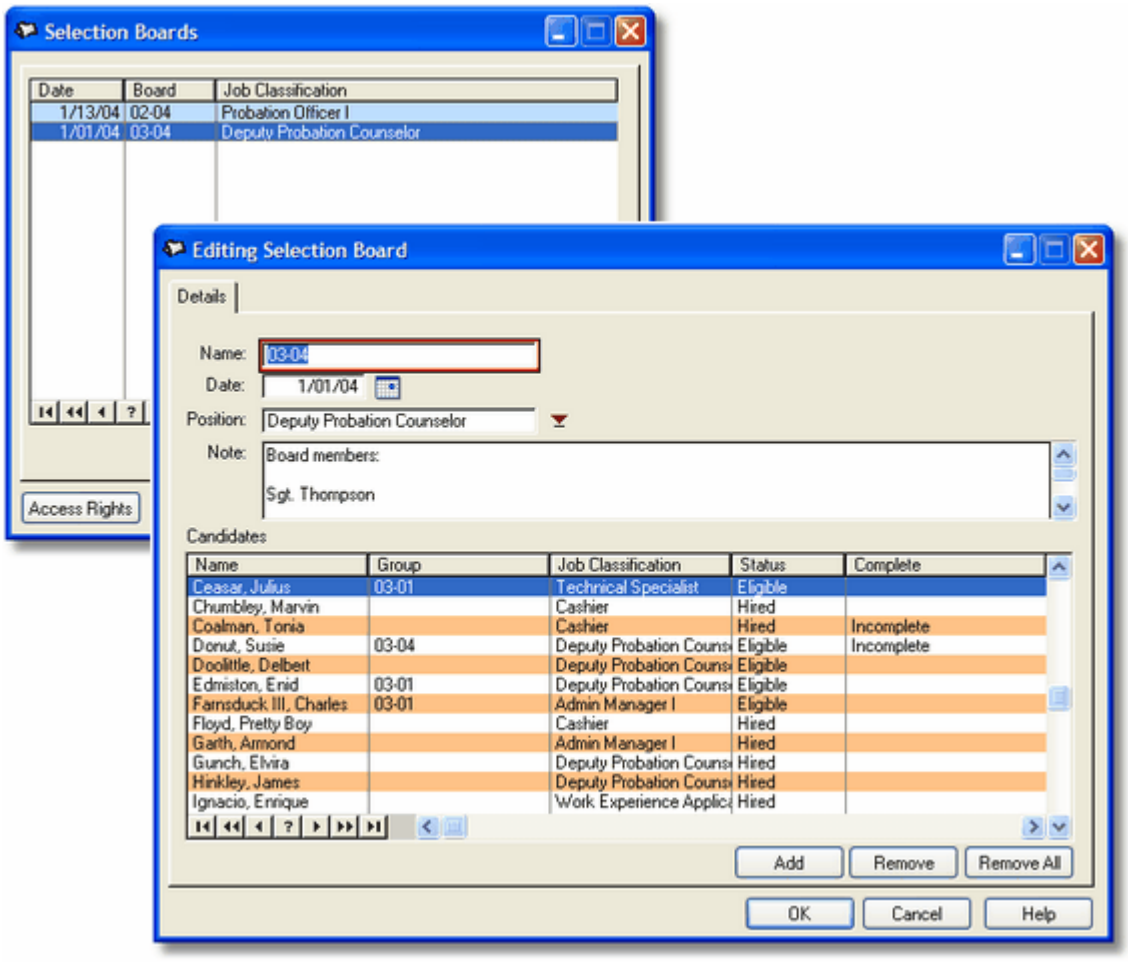

Selection Boards

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Pick Lists

Part VII

Pick Lists

8 Pick Lists

8.1 Candidates

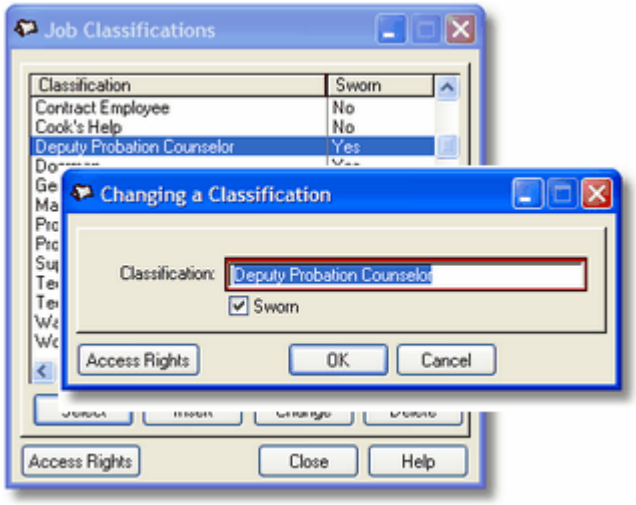
See Candidates List 10

8.2 Selection Boards

See the earlier topic on Selection Boards 62.

8.3 Job Classifications

Each candidate applies for a certain position, or Job Classification. This is a user-definable list, so you can enter any position for which you will use POBITS. Each Job Classification can be designated as a Sworn position (box is checked) or an unsworn position (box is unchecked). When you select a sworn position for a candidate, the sworn or unsworn attribute is inherited so other than here, you never need to apply this attribute directly to the candidate. You can control whether or not a user has the access rights to modify the list. See the topic on Access Rights 73.



Job Classifications

8.4 Groups

Each candidate can be assigned to a group. Groups are user definable. An example use would be to create a group for a time period or session such as 01-04 (group 1 of 2004). You can be as creative as you like. Remember that each candidate is assigned a job classification 65 so you probably don't need to create groups for that unless you find it useful for some other reason. When you open a Group record for editing, you can select the Candidates tab which will display all of the candidates assigned to the Group. You can control whether or not a user has the access rights to modify the list. See the topic on Access Rights 73.

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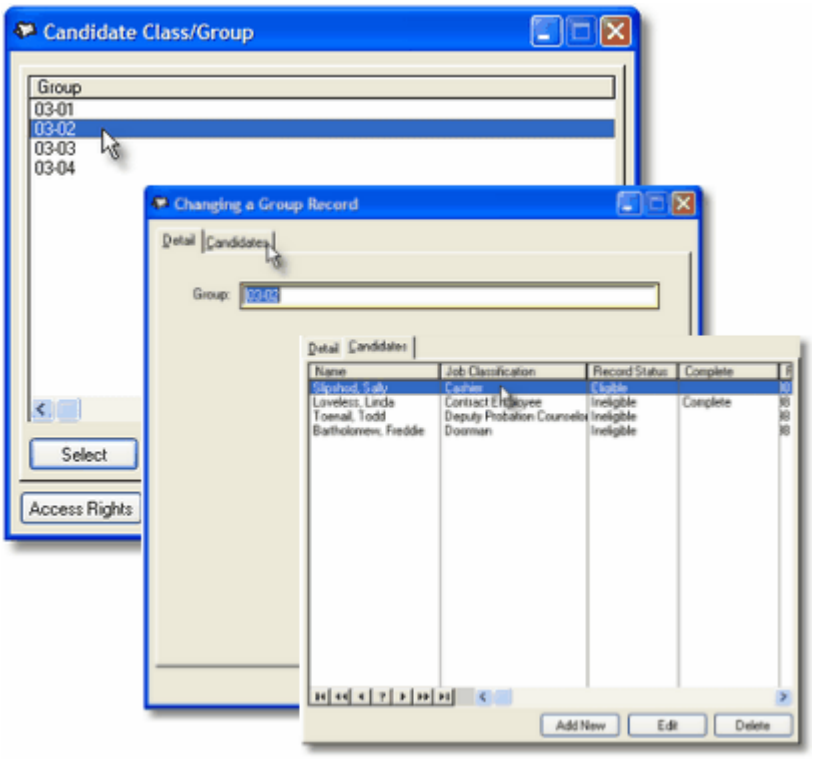

Groups

8.5 Ineligibility Reasons

Ineligibility reason are user definable. You can create your own reasons why a candidate is deemed ineligible. This list becomes important when you get reports on ineligibility. Ineligibility reports are available to display ineligibility by Reason and by Ethnicity. It's important to understand that ineligibility means that by your organization's rules, the candidate was deemed ineligible and the background investigation was presumably halted, though it may even be complete. You can control whether or not a user has the access rights to modify the list. See the topic on Access Rights 73.

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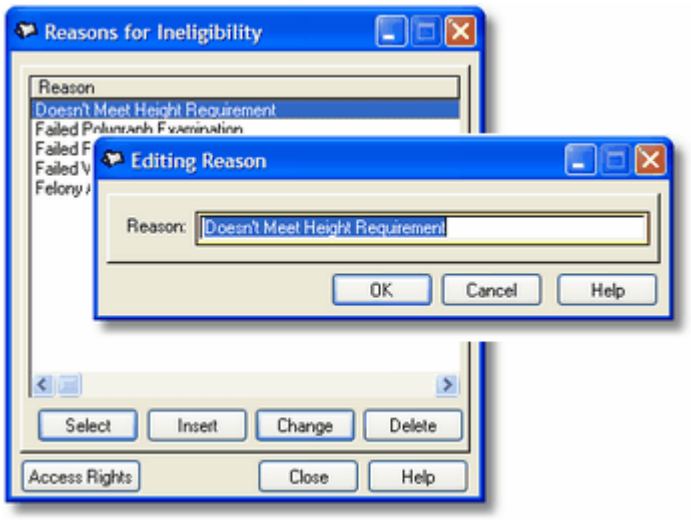
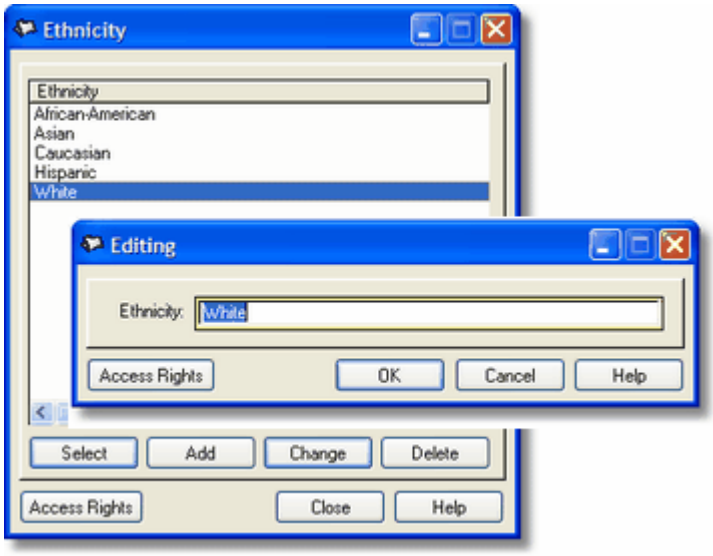


Ineligibility Reasons

8.6 Ethnicity

The pick list for Ethnicity is user definable. You can create lists of ethnicities to suit your environment and uses. You can do this "on the fly" meaning that at the time you look up a value for selection, you can alternatively add a new value and then apply it. You can control whether or not a user has the access rights to modify the list. See the topic on Access Rights 73.



Ethnicity

8.7 States

The States pick list is simply a list of all 50 states and territories. The list is user-definable in case change is ever necessary. You can control whether or not a user has the access rights to modify the list. See the topic on Access Rights 73.

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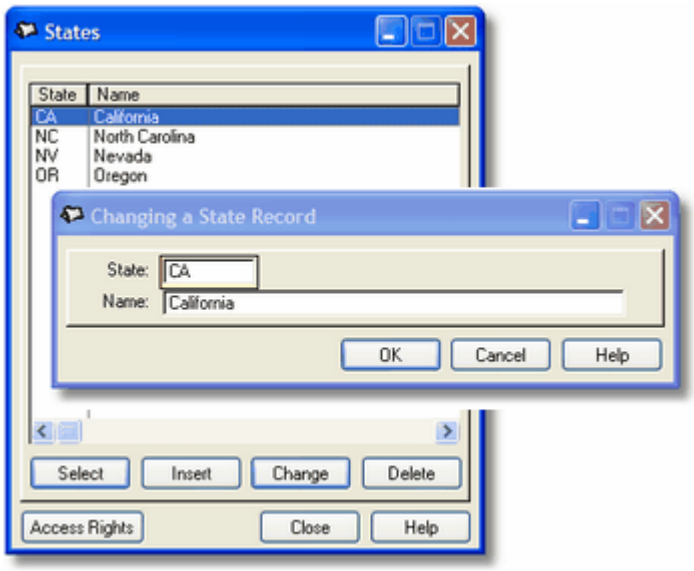

States

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Application Security

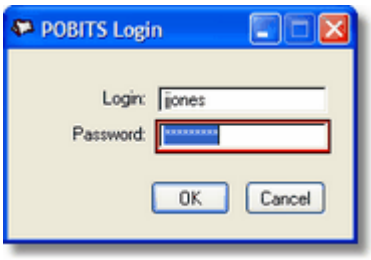
Part IX

Application Security

9 Application Security

9.1 General

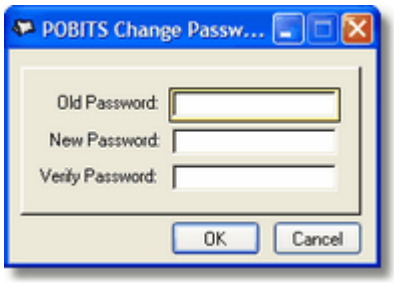
To use POBITS you must log on via the log on screen by entering your login and password. Both items are case sensitive and require an exact match. After three failed attempts, the program will close.



POBITS Login

9.2 Changing Your Password

To change your password, select the Change Password option under the Security menu. Enter your old (current) password then enter your new password, then enter your new password again to verity it. Remember that Supervisors do not have access to your password - if you forget it, your user profile will have to be deleted and a new one created.



Change Password

9.3 Logging on as a Different User

You may log on as a different user anytime by selecting this option under the Security menu. When selected, a normal login screen will be displayed. This may be convenient for setting and testing user access rights and is easier than closing POBITS and logging on again.

9.4 Show Logged on Users

The Show Logon On Users menu under the Security menu displays a list of all persons logged on to POBITS.

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Show Logged On Users

9.5 Screen Lock

The Screen Lock option under the Security menu is provided as a means to lock the program so that no other person may access it in case you care to step away from your work station for a moment. To unlock the screen, simply enter your password.

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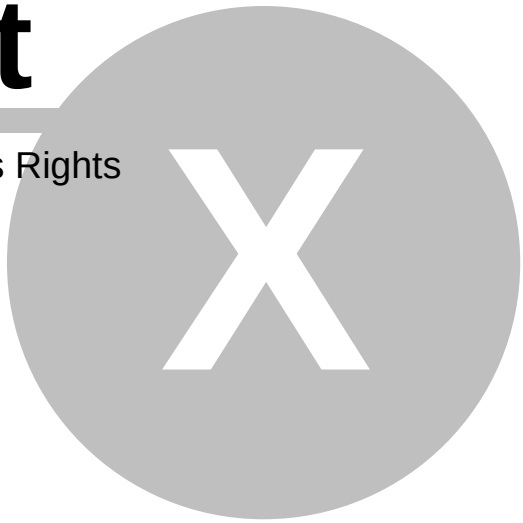
User Access Rights

Part

User Access Rights



10 User Access Rights

10.1 General

POBITS has a robust user access system that controls access to the program itself as well as to some individual screens within the program. Here are the empirical rules about POBITS access rights.

- Only authorized users can access the program - all users must "log in" to the program.
- Your license authorizes a fixed number of users that can be added.
- There are two types of users - Supervisors and Operators. The key difference is that Supervisors cannot be denied access to any features, even if they are assigned to User Groups who are denied. So if you intend to limit a user's access in any way, you must make them an Operator.
- Supervisors always have access rights to user administration and Operators never do.
- Many screens have a button labeled "Access Rights". Use this to assign each Operator's access to this screen. By default, they will have access unless they belong to a User Group that does not have access.
- Use of User Groups is optional.
- Users can be assigned to User Groups and access to screens can be enabled or disabled for Groups. This is preferable if you have many users - like 5 or more - where it is easier to set the access rights for a group and then simply assign individuals to a group.
- Users and User Groups can also have their access denied completely without removing each user profile.
- Supervisors do not have access to passwords. A default password (same as login) is assigned when the user profile is created. It is assumed the user will change their password right away. Having a password that is the same as the login is a bad practice from a security standpoint. If a user forgets their password, their user profile must be deleted and recreated in order to regain access.

10.2 User List

To view all users, select User Administration from the Security menu. From here you can add new users, edit existing users, and delete users. Note that you can change the first or last name of a user (synonymous with investigator) and this change will cascade throughout your candidate database for the investigator field. So if Mary Smith changes her name to Mary Jones, all instances of Mary Smith as an investigator will be changed to Mary Jones.

* Only Supervisors have access to the User Administration screen.

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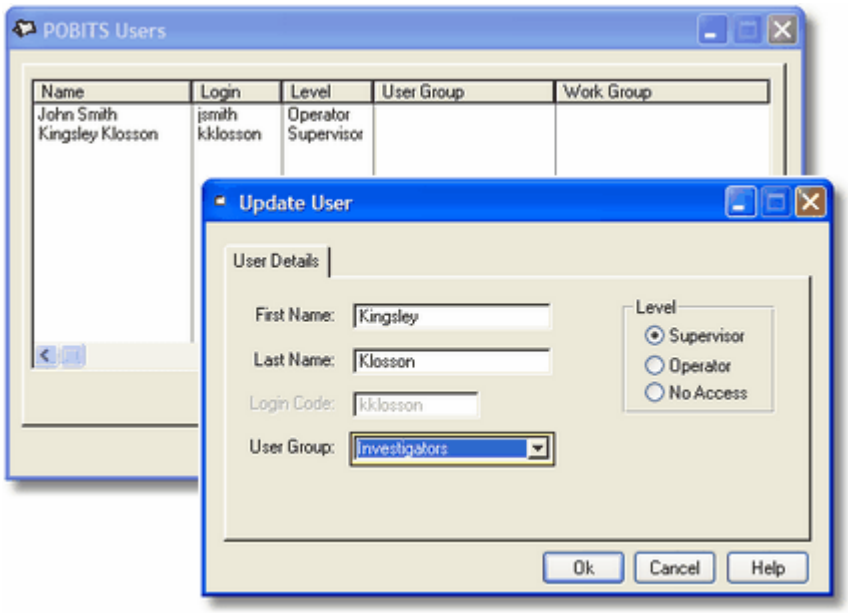

User List

10.3 Strategies For User Access Right

Depending on your needs and your licensing, you can follow several different strategies for granting access to your users. Here are a few:

Single User
Nothing to do. The first and only user will be a Supervisor by default and will have full access to everything.

Multiple Users - No Restricted Access
Same as single user. Simply add each user and make each a Supervisor.

Multiple Users - Some Restricted Access
Here is where you have many options. Each user can have their access restricted to various features. In general, this includes complete access or denial to any screen and in most cases access to certain buttons on each screen. As an example, you may want the user to be able to pick from the Job Classification list but you may not want them to be able to add, edit, or delete items from the list. To accomplish this, open the Job Classification list and select the Access Rights button. For each user (or for a User Group) select the screen control you wish to deny access to. The selected control will be disabled whenever the user accesses this screen.

See Setting Access Rights 75

User Groups
If you have several persons accessing the system whose access rights are essentially the same, you should consider creating a user group and assigning each person to the group. This way, when you want to create a restriction, you only need to restrict the group and all members of the group inherit the restriction. To create a User Group, open the User Administration screen (under the Security menu) and then open any user account. Select the User Groups button and create User Groups. Once created, users can be assigned to a group if desired. Note that while a Supervisor can be assigned to a User Group, the

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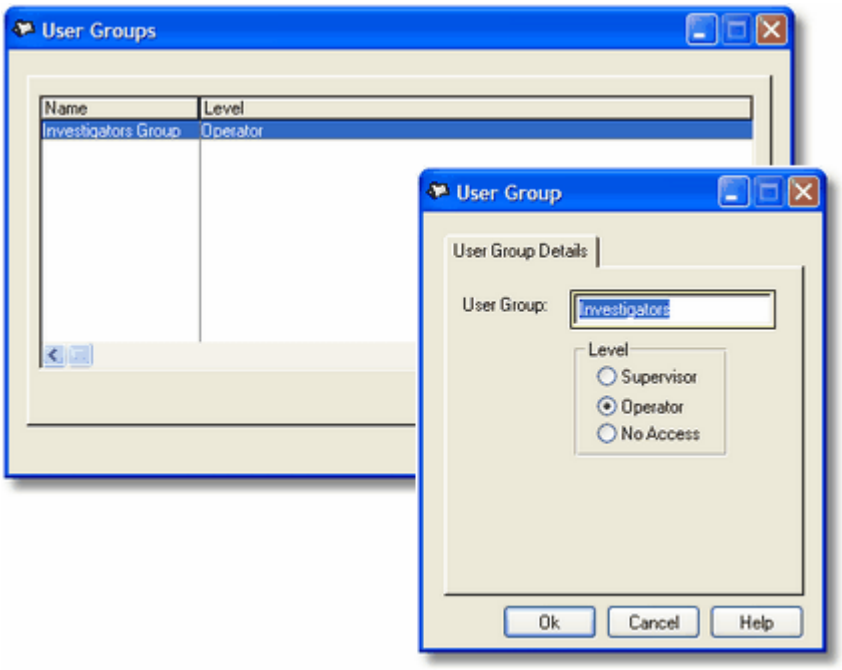
group's restrictions will have no affect - remember, **Supervisor access rights cannot be restricted**.

*Be careful not to completely restrict access to a screen that a user might need such as various pick lists. It's better to restrict their Add, Edit, and Delete options as stated above.

10.4 User Groups

User groups provide a means to establish and control access rights for a group of individuals as a collective unit. If you have several operators that you will assign identical access rights to, it will be easier to assign the operators to a group and then set access rights for the group as needed. You can combine this strategy with individual operator access rights if needed.

The group can have Supervisor or Operator access rights. But remember that the basic access rights rules 73 always apply.



User Groups

10.5 Establishing User Access for the First Time

The first time you run POBITS you will have to create the first user. This user will be a Supervisor by default. This user can then create other user profiles as necessary up to the number of users authorized by your license. Note that when user profiles are created, only the Login is provided and this will also be the password until it is changed by the user.

10.6 Setting Access Rights

There is no single point or window where all user access rights are set. Rather, each window where access rights are applicable has its own settings. The setting for each

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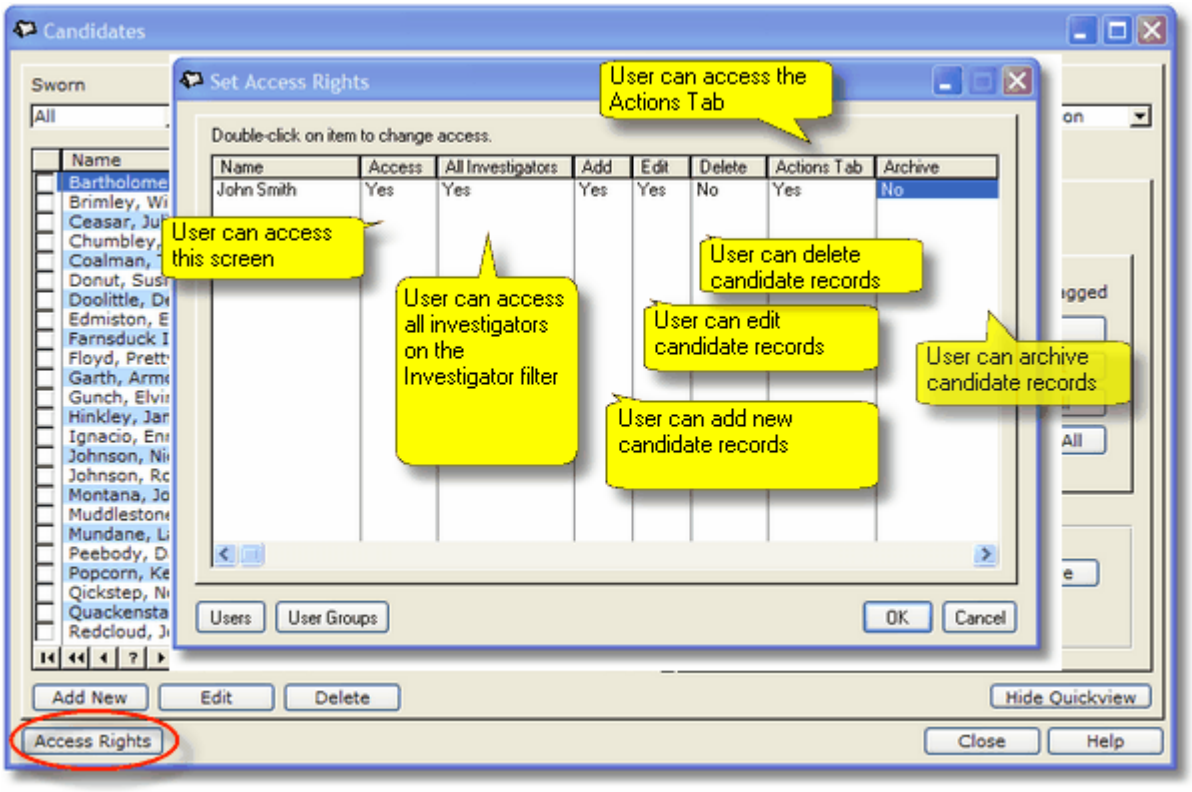
window vary according to the functions of the window. Where access rights can be set, there is always the ability to deny access to any Operator. Some windows, such as the candidate list, have buttons for Adding, Editing, and Deleting records. In these cases, each button can be disabled individually for each Operator. Below is the access rights screen for the candidate list, just as an example:



Access Rights - Candidate List

Each screen's access rights will be slightly different but the options are intuitive. The candidate list window, shown above, is probably the most complex in terms of options and as you can see, it's not very complex. For each option on each Operator, just double-click on Yes/No to either allow or deny the feature.

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License and Registration

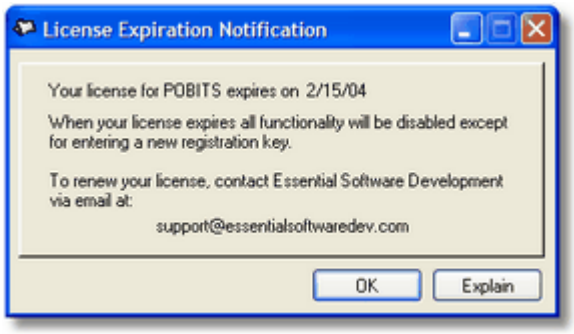
Part XI

License and Registration

11 License and Registration

11.1 License

POBITS is licensed to the person or organization identified in the License and Registration form within the program. The license identifies the number of authorized users you are permitted to add to the system. Your license is time-limited - that is, your license permits you to use POBITS for a certain duration, usually one year unless you purchase for a longer term. At the end of the license period POBITS will permit access only for renewing your license. Beginning 45 days prior to license expiration, POBITS will display the following screen during startup:

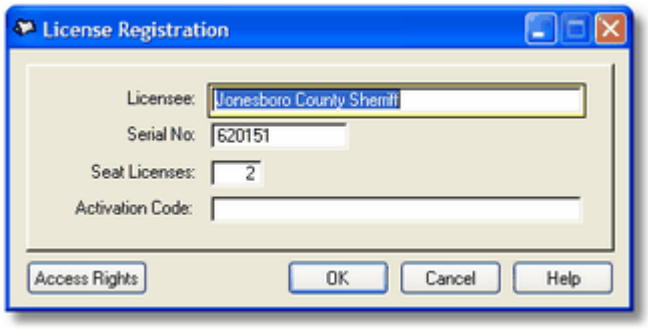

License Expiration Notification
Your license for POBITS expires on 2/15/04
When your license expires all functionality will be disabled except for entering a new registration key.
To renew your license, contact Essential Software Development via email at:
support@essentialsoftwaredev.com
OK
Explain

License Expiry Notification

The email address is a hyperlink for sending email to Essential Software Development. If necessary, we will guide you through the simple process of license renewal.

11.2 Registration

When you purchase one or more licenses for POBITS you will receive information to complete the registration form in the software. You must enter all items EXACTLY as provided to you - case sensitive. Once you do, your license will be activated for the period of time purchased. This information includes the number of user licenses purchased (seat licenses).



License Registration

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Technical Reference

Part XII

Technical Reference

12 Technical Reference

12.1 Pre-Purchase Technical Information

POBITS is targeted primarily to public sector organizations where most computer systems are professionally managed. Those system Supervisors will appreciate the fact that POBITS is very easy to install and maintain and will make a very small footprint on your server and desktops. POBITS is a self contained application that has few if any dependencies on specific operating system components. It will run on any 32 bit version of Microsoft Windows. Total installation before data should be ~7MB. The application can be installed entirely in one location and accessed from any work station that can connect to that computer. The database is file based and proprietary so there are no ODBC connections to make or maintain.

Access rights are controlled within the program itself and at least one application user must be designated as a Supervisor whose main supervisory function is to create other user accounts and control access rights for other users. There are no special skills required to be a POBITS Supervisor. See the topic on Access Rights 73 for further information.

All executables, DLLs, and other supporting files will be installed into the designated installation folder which is the only folder created or used by POBITS. The only downside is that being a file based system, POBITS will consume more network bandwidth than a similar application using a RDBMS (e.g., SQL Server, Oracle, Pervasive, etc.) back end.

You should have no worries that installing POBITS on any of your servers or work stations will cause a conflict with any other program. Many programs install runtime libraries, such as those used by Visual Basic, that are shared computer resources and the developer is dependent on the target machine having the same version of the runtime library as was used to develop the product. POBITS installs its own proprietary runtime libraries (into the POBITS installation folder) and those libraries are not shared with any other programs. Nor does it install any OCX controls or anything that requires registration on any computer. Feel safe.

POBITS is developed using Clarion™ for Windows which makes extensive use of procedure, code, and extension templates and relieves the developer from coding low level housekeeping activities and provides an abundance of pre-coded and pre-tested functions and capabilities to the developer with very low overhead. Clarion is an object-oriented language so opportunities for code re-use are abundant. The compiler is not much different than a C++ compiler and the resulting compiled executable is small and efficient.

Note that you will purchase an annual license for each POBITS user so depending on your budget, you will need to make certain decisions before you buy. For example, let's assume you have 4 persons (investigators) that intend to use the system. Each investigator will require a user account and therefore, a license. On the other hand, you may prefer to keep your investigators investigating and designate a single person to access POBITS and maintain the data. It's entirely up to you but it's important to understand this as you consider your purchase. Also note that within POBITS, investigators are synonymous with users.

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12.2 About the Data File System

POBITS uses a file based database system. Each data table is maintained in a logical data file and shared as needed with other concurrent users. The file system is very robust and capable of handling millions of records even in a multi-user environment. However, the development approach required that on the candidate list view, the user be able to apply filters to the list. This has a negative impact on file loading and display when records get toward the ten thousand mark or so (highly subjective number). File archiving is supported so that you can move dormant files to a separate file to reduce the burden. So you never have to fully delete a candidate record, just archive it. However, when a file is archived, it is no longer part of the consideration for reports, tallies, or any other global information about your candidates.

12.3 Network Installation

POBITS can be installed in any location on your network. Other computers can access POBITS by simply establishing a shortcut to the executable (POBITS.EXE). It is recommended that any network shortcut to POBITS be established via a mapped drive as opposed to via Network Neighborhood or My Network Places. As stated earlier, POBITS is not a Relational Database Management System (RDBMS) so it is not as network efficient as it would be if it were - but then again, if it was, it would cost thousands more. So POBITS performance will benefit from having fast computers on a fast network. If your network has any 10mb segments, POBITS performance will benefit from an upgrade to 100mb or gigabit if possible. However, even under the worst of circumstances, POBITS performance should be acceptable. If you are suffering severe delays or unacceptable performance in a network environment, chances are there are other issues or that overall, your network bandwidth is just inadequate.

12.4 Multi-user considerations

Multi-user concurrent operation is fully supported. All aspects of record locking and control are enforced by the POBITS runtime libraries. Basically, if two people open the same record for editing, the second user will be notified that the record was changed by another station and offered the opportunity to refresh the record view. No configuration of any kind is necessary to enable multi-user support, however, your license will determine the maximum number of users for the system. Regardless of how many users you may have, there is no reason that all users cannot access the system concurrently.

12.5 Data File Management

Data file management - available under the tools menu, is provided so that end users can perform certain maintenance functions on data files. You will not need to perform any of these functions on a regular basis - the tools are provided primarily as a means to repair file malfunctions that may occur due to some circumstance beyond your (or our) control. The most likely use of this tool is to repair a damaged or corrupt data file. Should a data file become corrupt, it will probably manifest itself with total application failure when the file is accessed. When you then restart POBITS, you will be advised of what file is corrupt and you can then run the file management utility and select the file for repair (fix). In most cases, this will resolve everything.

If you are suffering from regular file corruption problems, we recommend you contact

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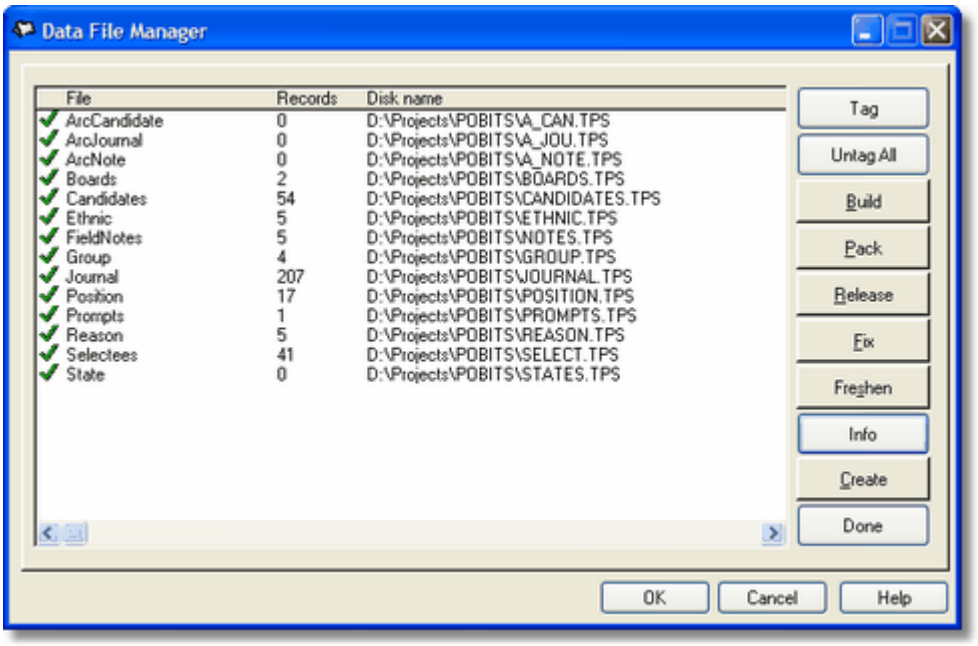
Essential Software Development directly for a long-term resolution.



Data File Manager

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Purchasing and Support

Part XII

Purchasing and Support

13 Purchasing and Support

13.1 Purchasing and Renewing

PURCHASING

POBITS is licensed on an annual basis. You must purchase an annual license for every user (also called Investigators within POBITS). So if you have three users you will need three licenses. If one of your users is replaced, you simply change the user in POBITS to reflect the new user. So the license is not attached to the individual. It's just the number of users allowed to use the system.

RENEWING

45 days before your license expiration date, POBITS will notify you on startup that your licence will soon expire. Depending on how long your purchase cycle is, you may want to begin your renewal process at this time to ensure continuous performance.

EXPIRATION

When your license has expired, you will not be able to operate any POBITS functions except for Registration - to enter a new license code. Once you enter a new license code and restart POBITS, full operation will be restored and no data will be lost.

13.2 Support

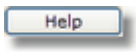
Support for POBITS is provided by several means...

Direct User Support

Please use the following contact addresses to obtain support:

Email: support@essentialsoftwaredev.com
Phone: 703-909-9865

On-Line Help



Note that every screen in POBITS has a button labeled Help which displays a help topic about the screen.

Broadcast Communication from Essential Software Development

Essential Software Development uses Yahoo Groups as a means to communicate directly to all POBITS users. To receive such communications, you need to subscribe to the POBITS Group mailing list. This is easy to do, simply send a blank email message to:

pobits-subscribe@yahoogroups.com

Within moments, you will receive an automated message that you must respond to. Once

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you respond you are subscribed. Only the list owner can send messages via this list and your email address and name is not used for any purpose other than supporting this service.

To unsubscribe, send a blank message to:

pobits-unsubscribe@yahoogroups.com

User Forums

Essential Software Development operates a forum for user-to-user and user-to-developer interaction. The web site address is:

http://essentialsoftwaredev.com/cfcforum/index.php?c=3

You may visit and read posts all you like but if you want to post a message you must register with the forum. Again, your email information is not used for any purpose other than the administration of the forum.

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Index

- A -

Access 73
Access Rights 73, 75
Action tab 16
Actions 10
Adding Candidates to a Selection Board 16
Application Security 70
Archive Window 16
Archiving Reports 52
Auto-size Columns 10

- B -

Basic Course 27
Batch Investigator Change 15
Board 16
Boards 40, 57, 58, 62

- C -

Candidate Checklist Report 54
Candidate Groups 65
Candidate Status 24
Candidate Summary Report 52
Candidates 16
Candidates List 10
Change Password 70
Changing Investigators for Multiple Candidates 15
Checklist Report 16, 54
Check-off items 7
Concept of Operation 7
Contact with references 25
Creating Correspondence 47
Credit History 34

- D -

Data File Manager 81
Data File System 81
Discrepancy 48
Disqualifying Information 48

- E -

Education History 27
Eligible 24
Email 7, 13
Employment History 31
Establishing Access Rights 75
Ethnicity 67
Examinations 37

- F -

File Corruption 81
Filtering 10
Financial History 34
Financial Tab 34
First Time Access 75

- G -

Groups 65

- H -

Hired 16, 24, 58
Hiring 16

- I -

Ineligibility 55, 56, 66
Ineligibility Reason 66
Ineligibility Report by Ethnicity 56
Ineligibility Report by Reason 55
Ineligible 24
Interviews Tab 38
Investigator 15
Investigator's Notes 42

- J -

Job Classification 65
Journal Entry 16
Journal Tab 42

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- L -

Legal History 35
License 78
License Registration 78
Lists 65, 66, 67
Local Records Check 40
Log in 73
Log on 70
Logging on as a Different User 70
Login 70

- M -

Mail Merge 15
Mail Merge Concept 13
Mail Merge Options 15, 47
Merge 13, 15
Military History 33
Motor Vehicle Operation History 36
MS Wod 13
MS Word 15, 47
MS Word Mail Merge Tool Bar 15
Multi-User 74
Multi-User Considerations 81

- N -

Network Installation 81

- O -

Operator 73, 75
Operators 75
Opportunity of Selection 59
Opportunity of Selection Report 58
Options 15, 51

- P -

Password 70
Performance 16
Personal Information 17
Personal Tab 17
Photos 10
POBITS Login 70
Position 65
Pre-destination 50
Pre-Purchase 80
Preview 50
Print 50
Printing 50
Printing the Candidate Summary Report 52
Purchasing and Renewing 84

- R -

Red Flag 48
Reference and Relatives 25
Registration 78
Relatives and References 25
Repair 81
Report 50, 55, 56
Report Destination Dialog 51
Report Destination Dialog - Archive 51
Report Destination Dialog - Options 51
Report Pre-destination Dialog 50
Report Review Toolbar 50
Reports 16, 50, 59
Residence History 29
Roster 57

- S -

Screen Lock 71
Security 73, 75
Selection 59
Selection Board Roster Report 57
Selection Boards 40, 58, 62
Selection Report 58
Settings 75
Show Logged On Users 70
Single User 74
Sorting 10
States 67
Status Tab 24
Strategies for Access Rights 74
Summary Report 16, 52
Supervisor 73
Support 84

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- T -

Tagged Candidate Journal Entry 16
Tagging Record - Button 13
Tagging Records - Mouse 13
Technical 81
Technical Information 80
Tests 37
Training 27

- U -

User Access 75
User Defined Tab 41
User Groups 73, 74, 75
User List 73
Users 73, 75

- V -

Viewing Users 73

- W -

Welcome 5
Word 13, 15
  Mail Merge 47
Work Flow 24

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